GREATER HAMILTON REPORTS

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GREATER HAMILTON

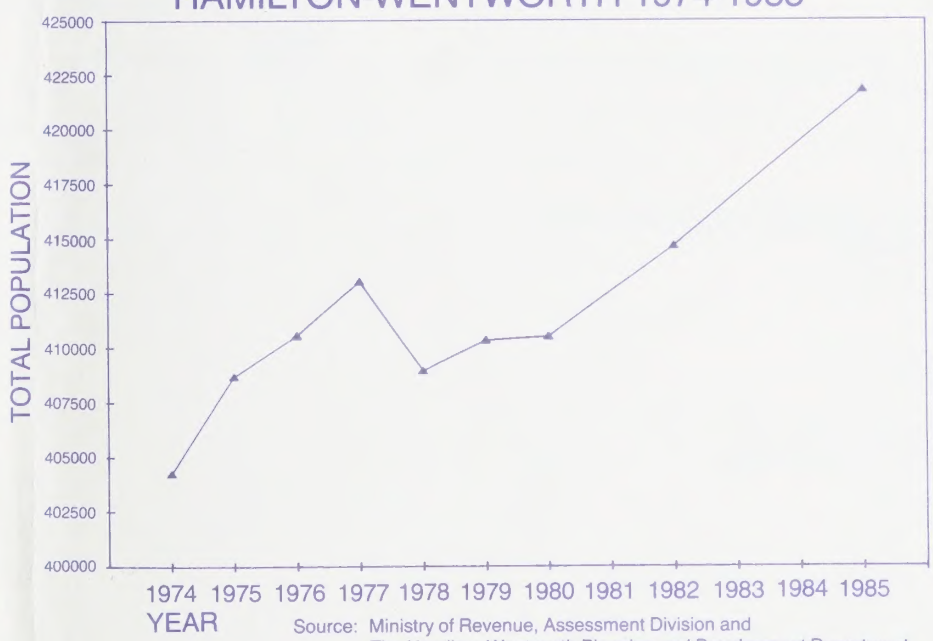
Population Trends

Demographics - Report 87 - 1

HIGHLIGHTS

- *Hamilton-Wentworth's population has increased at a moderate but steady rate of 0.5% per year for the last five years.*
- *The Region continued to grow during the recession of the 1980s.*
- *Hamilton-Wentworth is one of only three regions in Southern Ontario that grew faster between 1982 and 1985 than between 1971 and 1981.*
- *Birth rates in the Region are lower than the Provincial average and death rates are higher.*
- *The number of births in Hamilton-Wentworth has been increasing modestly since 1981.*
- *Ontario is the main source and destination of migrants to and from Hamilton-Wentworth.*
- *The Toronto CMA provided 50% of the Hamilton CMA's net migration gains from other Ontario CMAs between 1976 and 1981.*
- *Children (under 15) and 35-44 year olds are expected to be the two largest segments of the Regional population by 1996.*
- *Hamilton-Wentworth has the lowest proportion of children and the third highest proportion of the 65 + age group among the nine Regions in Southern Ontario.*
- *Within the Region, Ancaster has been growing at the fastest rate since 1982, but Stoney Creek has grown the most.*
- *The main growth areas in the Region are urban Stoney Creek, the south Mountain area in Hamilton, Ancaster and Waterdown.*
- *The City of Hamilton's population has decreased by 0.4% since 1982, with virtually all the loss occurring in the lower City.*

POPULATION HISTORY
HAMILTON-WENTWORTH 1974-1985



Source: Ministry of Revenue, Assessment Division and
The Hamilton-Wentworth Planning and Development Department

GROWTH

Hamilton-Wentworth's population has grown from 404,267 in 1974 when the Region was formed to 421,783 in 1985, a 4.3% increase. Approximately two-thirds of this increase has taken place since 1980.

The Region's average annual growth rate has rebounded from the low levels of the late 1970s to a respectable 0.5% per year in the last five years. The upturn in growth started during the 1980s recession. The main reason for the higher growth rate was a reduction in out-migration.

Produced by: The Hamilton-Wentworth Region • Planning and Development Department • Strategic Planning Division

POPULATION CHANGE HAMILTON-WENTWORTH 1974 - 1985

Period	Total Population Change	Average Annual Change	Average Annual Growth Rate
1974-1977	8756	2919	0.7%
1977-1980	-2520	-840	-0.2%
1980-1985	11280	2256	0.5%

Source: Ministry of Revenue, Assessment Services Division and The Hamilton-Wentworth Planning and Development Department

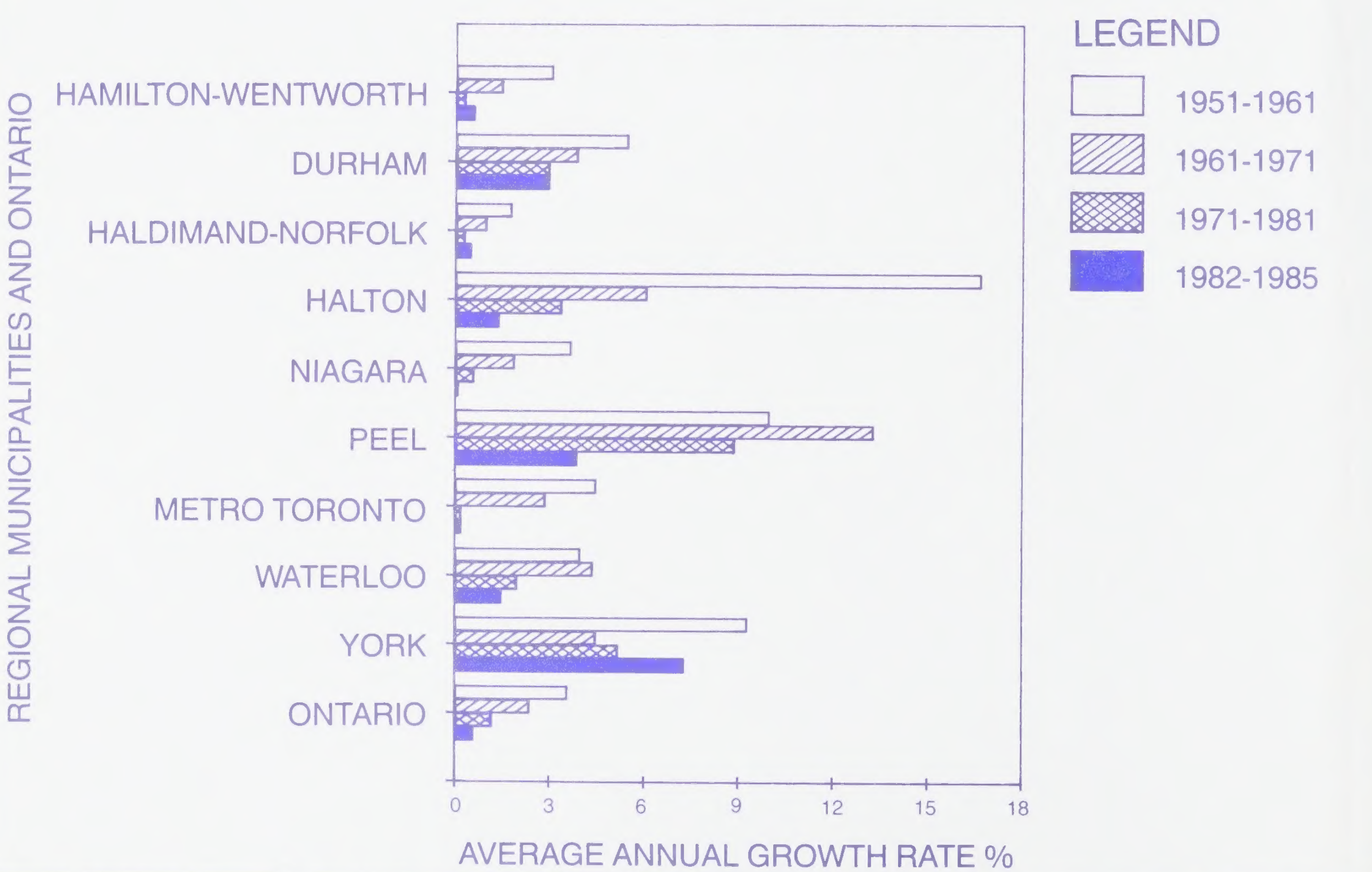
COMPARATIVE GROWTH

Hamilton-Wentworth's growth rate between 1982 and 1985 was sixth highest among the nine Regions in Southern Ontario. The three Regions surrounding Metropolitan Toronto (Peel, York and Durham) continue to have the highest growth rates.

Hamilton-Wentworth is one of only three Regions in Southern Ontario that grew faster between 1982 and 1985 than between 1971 and 1981.

The Region's share of the Provincial population decreased from 5.8% in 1951 to 4.8% in 1981, primarily as a result of rapid growth in the Toronto area. It has remained at approximately 4.75% since 1982.

AVERAGE ANNUAL GROWTH RATES
REGIONAL MUNICIPALITIES AND ONTARIO
1951 - 1985



MIGRATION

Ontario is the main source and destination of migrants to and from the Hamilton Census Metropolitan Area (CMA), which consists of Hamilton-Wentworth, Burlington and Grimsby. Between 1976 and 1981, 79% of Canadian migrants to the Hamilton CMA came from Ontario, and 73% of the CMA's out-migrants remained in the Province.

The single largest source of net migration gains from other parts of Ontario was the Toronto CMA, which provided 50% of the net migrants to the Hamilton CMA from other Ontario CMAs. The St. Catharines-Niagara CMA provided another 30% of the net migrants from other CMAs. There was also net migration gains from the Kitchener, London, Windsor and Sudbury CMAs.

Hamilton-Wentworth experienced a net loss of approximately 4,000 people to other provinces between 1976 and 1981, mostly to Western Canada. Since Ontario is now gaining migrants from the West as a result of the strong performance of the Ontario economy and the relatively poor performance of the Western economy, it is highly probable that the Hamilton CMA is also gaining migrants from the West.

In 1984, 1,607 of the 88,239 immigrants into Canada gave the Hamilton area as their destination. Thirty-~~two~~ one percent of these immigrants were from South-East Asia, primarily Vietnam and Hong Kong. Over 21% came from Europe, mainly from countries in Eastern Europe.

MIGRATION TO AND FROM HAMILTON CMA 1976 - 1981

Census Metropolitan Area	In-Migrants		Out-Migrants	
Eastern Canada CMAs	750	1.5%	755	1.4%
Quebec CMAs	4,475	8.8%	720	1.3%
Western Canada CMAs	1,930	1.5%	5,475	10.1%
British Columbia CMAs	750	3.8%	2,185	4.0%
Ontario CMAs				
Kitchener	1,915	3.8%	1,745	3.2%
London	1,665	3.3%	1,495	2.8%
Oshawa	390	0.8%	425	0.8%
Ottawa-Hull	1,220	2.4%	1,285	2.4%
St. Catharines-Niagara	3,860	7.6%	2,815	5.2%
Sudbury	495	1.0%	240	0.4%
Thunder Bay	190	0.4%	345	0.6%
Toronto	13,860	27.3%	12,110	22.4%
Windsor	865	1.7%	480	0.9%
Ontario CMAs Subtotal	24,460	48.2%	20,940	38.8%
Non-CMAs				
In Ontario	15,765	31.0%	18,535	34.3%
In Other Provinces	2,665	5.2%	5,425	10.0%
Non-CMAs Subtotal	18,430	36.3%	23,960	44.3%
Total	50,795	100.0%	54,035	100%

Note: Percentages may not add to 100 due to rounding.
Source: Statistics Canada, 1981, Catalogue 92-907

IMMIGRANTS TO HAMILTON AREA 1984

Country of Last Residence	% of Total Immigrants
United Kingdom	9.4%
Europe	21.3%
Caribbean & Guyana	5.8%
Central & South America	6.5%
Middle East	4.2%
Africa	1.6%
South Asia	8.5%
South-East Asia	31.1%
Other Asia	2.2%
United States	8.3%
Other	1.1%

Note: Hamilton is the general destination given by immigrants and may include surrounding municipalities.

Source: Ontario Ministry of Citizenship and Culture, Immigration Statistics, 1984.

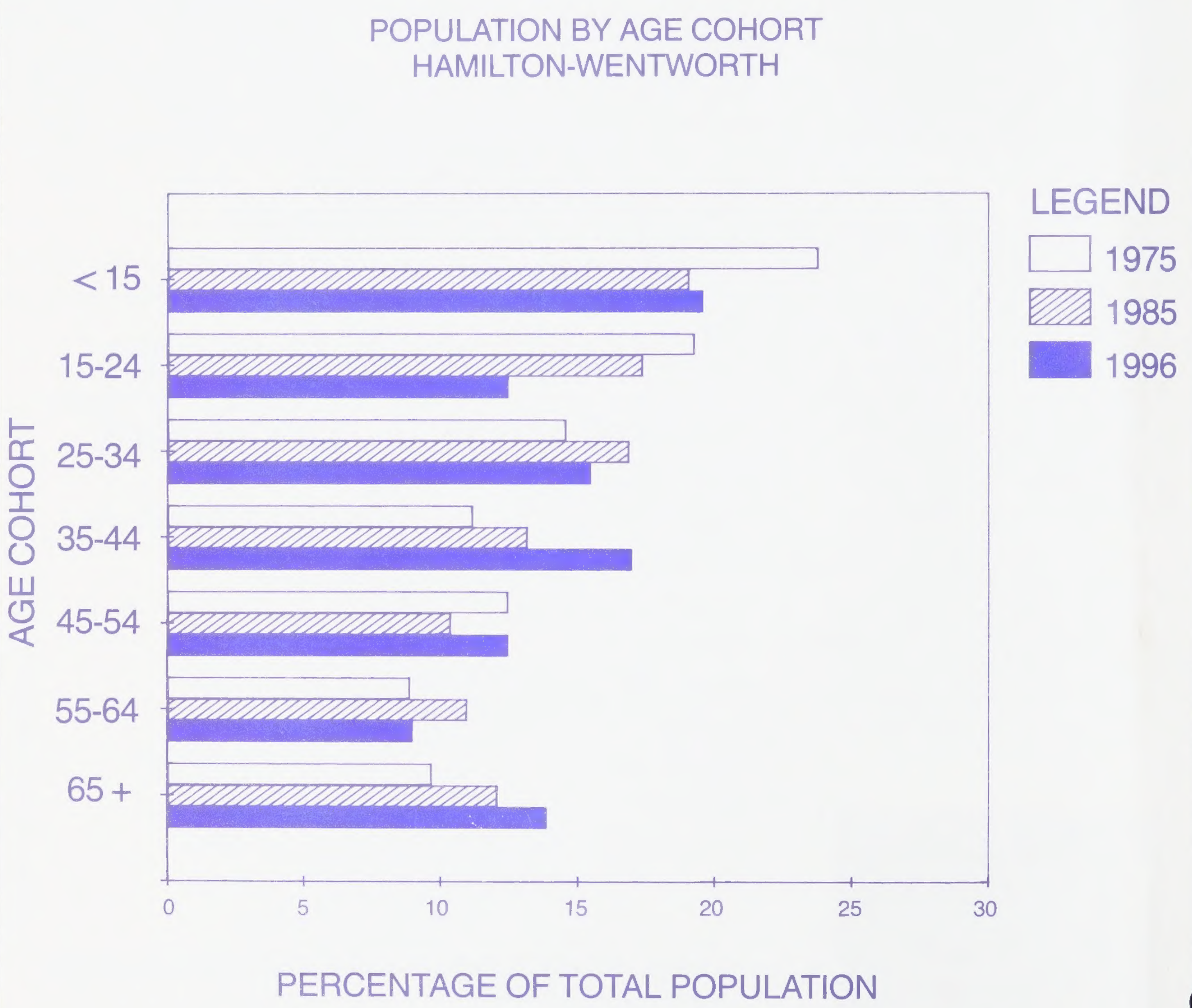
AGE DISTRIBUTION

Although the percentage of children in Hamilton-Wentworth decreased from 24% in 1975 to 19% in 1985, the under 15 age group is still the largest in the Region, and will remain the largest for at least the next ten years.

The share of the Region's population in the 15-24 year old age group is expected to decrease dramatically from 17.4% in 1985 to 12.5% in 1996.

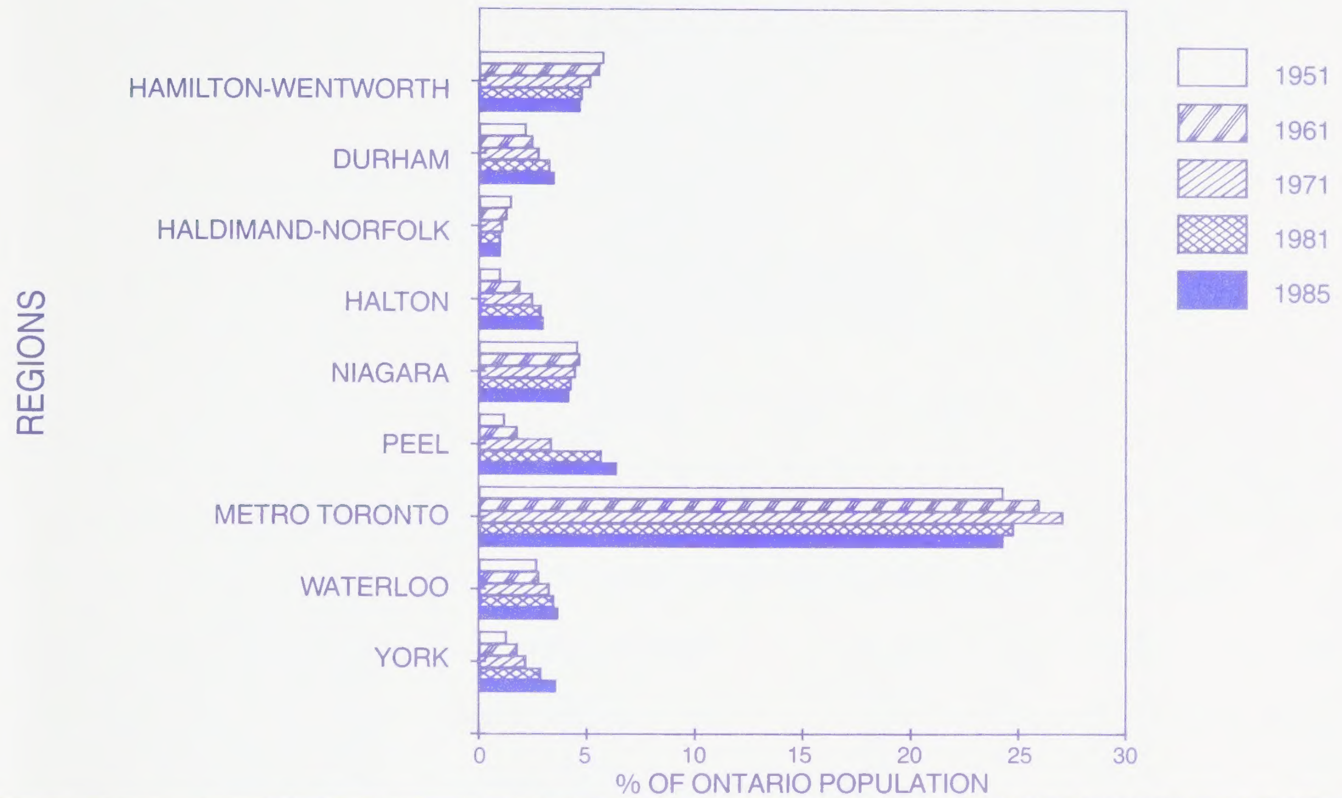
The aging of the "baby boom" generation will increase the size of the 35-44 age group by 41% between 1985 and 1996, a significantly larger increase than for any other age group. Since the under 15 and the 35-44 age groups will be the two largest segments of the population by 1996, policy issues related to children and parenting are likely to become increasingly important.

The number of people in the 65+ age group has increased by 27% in the last ten years. It will continue to grow significantly, which will lead to increased demand for senior citizens' housing and other specialized services and facilities.



Source: Ministry of Revenue, Assessment Services Division and The Hamilton-Wentworth Planning and Development Department.

REGIONAL POPULATION SHARES % OF TOTAL ONTARIO POPULATION
1951 - 1981



POPULATION PROJECTIONS

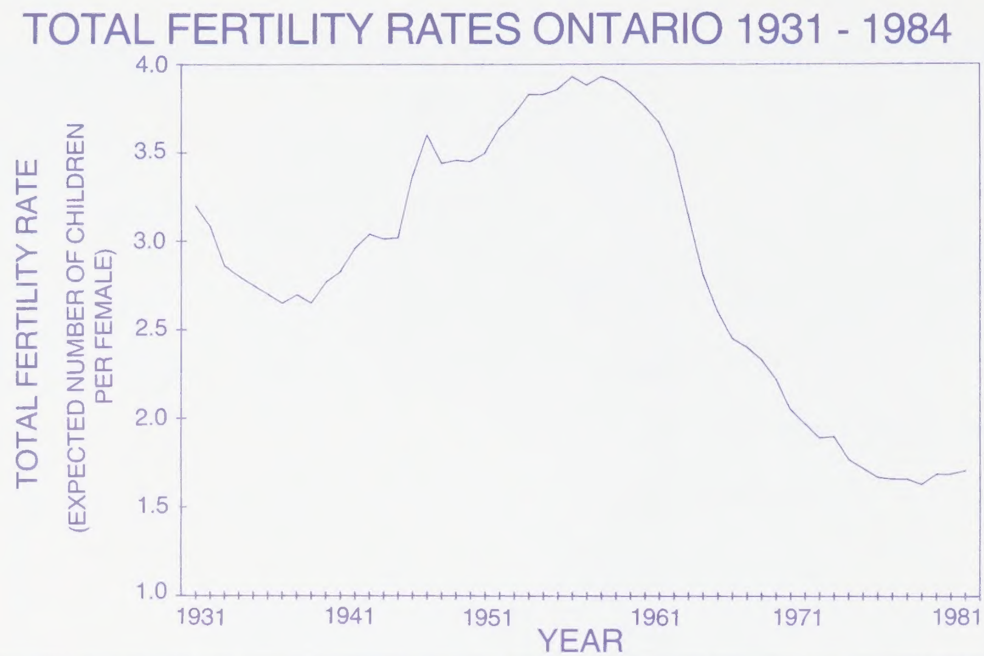
Projection Type	Region 1986	Region 2001	MTE 2001
High	436,500	479,000	—
Low	422,000	423,000	—
"Most Likely"	428,500	445,000	446,645

Sources: The Hamilton-Wentworth Planning and Development Department. Hamilton-Wentworth Population Projections 1981 Review, September 1981, and Ministry of Treasury and Economics, Demographic Bulletin, August 1985.

EXPECTED GROWTH

In 1981, the Planning and Development Department published population projections for the Region to the year 2001. The report contained three projections based on different assumptions — a low of 423,000, a high of 479,000, and a most likely of 445,000. The average annual growth rate for the last 5 years has exceeded the growth rate assumed in the most likely projection, offsetting a slower than projected growth rate between 1979 and 1981.

In 1985, the Ontario Ministry of Treasury and Economics (MTE) published Provincial population projections to the year ~~2006~~ 2001 at the county and regional level. MTE projected a population of 446,645 for Hamilton-Wentworth in 2006, which is consistent with the Region's "most likely" projection.



BIRTHS AND DEATHS HAMILTON-WENTWORTH 1974-1985

Year	Births	Deaths	Natural Increase
1974	5,932	3,126	2,806
1975	5,816	3,182	2,634
1976	5,700	3,168	2,532
1977	5,589	3,235	2,354
1978	5,569	3,312	2,257
1979	5,467	3,213	2,254
1980	5,569	3,403	2,166
1981	5,563	3,302	2,261
1982	5,658	3,284	2,374
1983	5,778	3,365	2,413
1984	5,834	3,398	2,536
1985	6,092	3,463	2,629

Source: Registrar General, Province of Ontario, Vital Statistics

BIRTH AND DEATH RATES ONTARIO AND HAMILTON-WENTWORTH 1974-1984

	BIRTH RATES		DEATH RATES	
	HAMILTON-WENTWORTH	ONTARIO	HAMILTON-WENTWORTH	ONTARIO
1974	14.6	15.3	7.7	7.5
1975	14.1	15.3	7.7	7.4
1976	13.9	14.8	7.7	7.3
1977	13.6	14.7	7.9	7.4
1978	13.4	14.3	8.0	7.2
1979	13.1	14.3	7.7	7.2
1980	13.5	14.4	8.3	7.3
1981	13.5	14.2	8.0	7.3
1982	13.6	14.3	7.9	7.3
1983	13.8	14.4	8.1	7.3
1984	14.1	14.7	8.1	7.2

Source: Registrar General, Province of Ontario, Vital Statistics

NATURAL INCREASE

The fertility rate in Ontario reached 3.92 at the peak of the post-war baby boom in 1957. It declined through the 1960s and 1970s, bottomed out at 1.63 in 1981, and then rose slowly. By 1984, it had reached 1.69, still well below the replacement level of 2.1.

Despite the rise in the fertility rate, the slight increase in the number of births in Hamilton-Wentworth since 1981 is primarily a result of an increase in the number of women in the prime childbearing years. The number of births is expected to decrease as the "baby boom" population ages.

Birth rates in Hamilton-Wentworth have been lower than the Provincial average because the Region has a smaller proportion of women in the prime childbearing years. In 1984, the Region's birth rate was 14.1 per thousand, while the Provincial birth rate was 14.7.

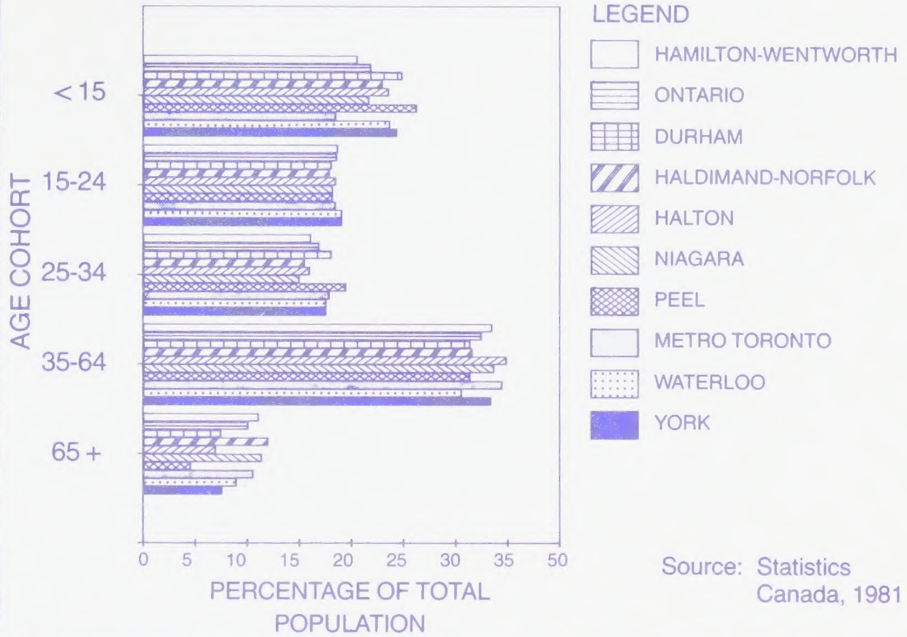
Death rates in Hamilton-Wentworth have been higher than the Provincial average, because the Region has a higher proportion of people over 55. In 1984, the Region's death rate was 8.1 deaths per thousand, while the Provincial death rate was 7.2.

REGIONAL AGE DISTRIBUTION COMPARISONS

The Region's population is older than the Ontario average. In 1981, Hamilton-Wentworth had the second lowest proportion of children and the third highest proportion of the 65 + age group among the nine Regions in Southern Ontario.

Hamilton-Wentworth's age distribution is typical of Regions that have experienced relatively slow growth since 1951. Peel, Durham and York, the fastest growing Regions, have high proportions of their populations in the under 15 age group, and low proportions in the 65 + age group. Hamilton-Wentworth, Haldimand-Norfolk, Niagara and Metropolitan Toronto have large proportions of people in the 55-64 and 65 + age groups.

POPULATION BY AGE COHORT
REGIONAL MUNICIPALITIES & ONTARIO 1981



Source: Statistics Canada, 1981

GROWTH IN THE REGION

Ancaster has been the fastest growing municipality in the Region since 1982, but Stoney Creek has grown the most. Ancaster registered a 14.2% increase in population between 1982 and 1985, followed closely by Stoney Creek at 12.9%. Stoney Creek's population increased by over 4,800 people, more than double the increase of any other municipality. Ancaster and Stoney Creek together accounted for 82% of the population growth in the Region between 1982 and 1985.

Flamborough has also been growing faster than the Regional average, with a 4.5% population increase since 1982.

Hamilton's population has decreased by 0.4% since 1982. Virtually all of the population loss occurred in the lower city. Much of the decline consists of young adults moving to the suburbs, leaving behind smaller households and an older population.

The Region's rural areas have experienced minimal population increase during the last five years.

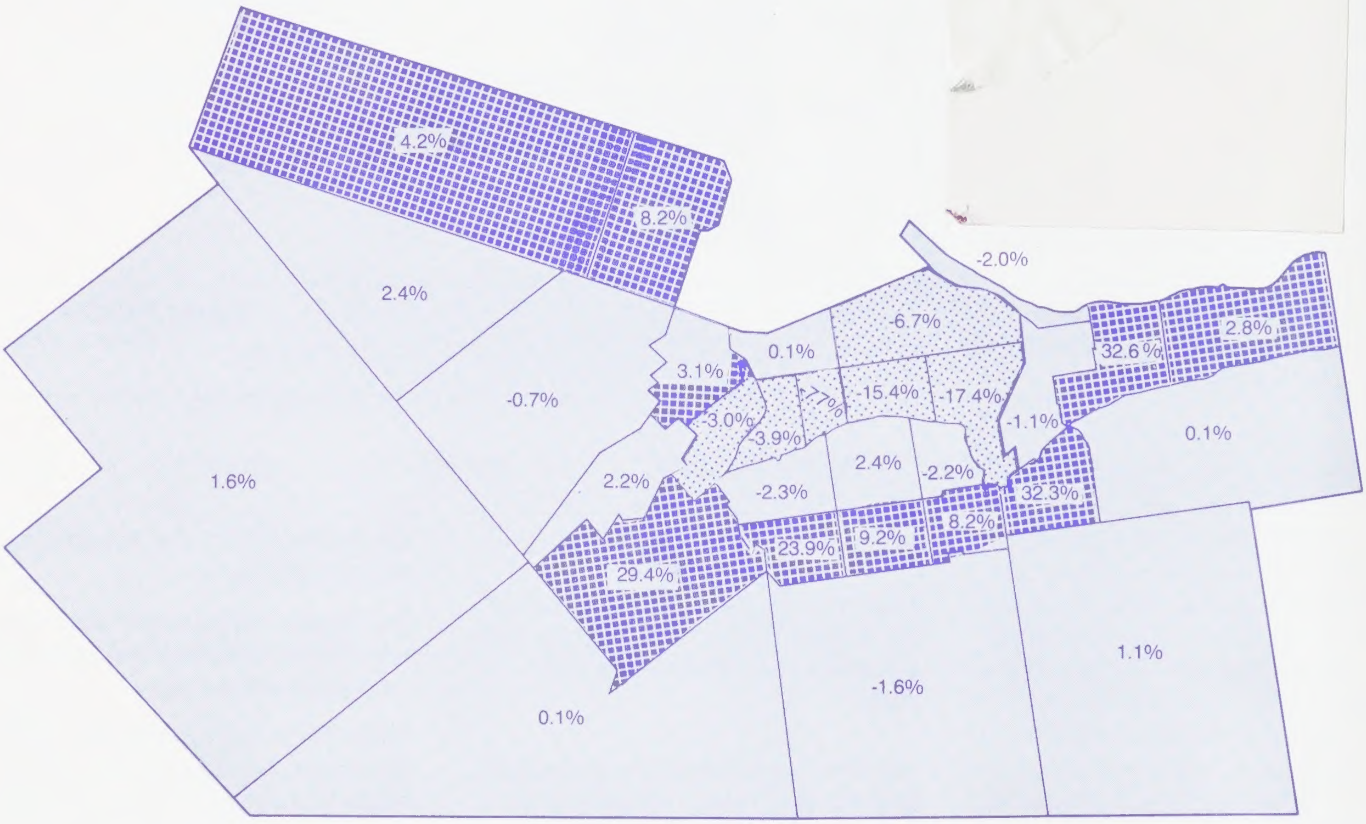
Most of the recent population growth in the Region has been in four areas: urban Stoney Creek, both below and above the Escarpment; the south Mountain area in Hamilton; Ancaster; and Waterdown.

POPULATION GROWTH BY AREA MUNICIPALITY
1982 - 1985

Area Municipality	1982 Population	1985 Population	Growth	% Change
Ancaster	14,780	16,882	2,102	14.2
Dundas	19,689	20,071	382	1.9
Flamborough	24, ~~25~~,610	25,727	1,117	4.5
Glanbrook	9,549	9,513	-36	-0.4
Hamilton	308,402	307,140	-1,262	-0.4
Stoney Creek	37,613	42,450	4,837	12.9
Total	414,643	421,783	7,140	1.7

Source: Ministry of Revenue, Assessment Services Division and The Hamilton-Wentworth Planning and Development Department.

SHARE OF REGIONAL POPULATION GROWTH FROM 1982 TO 1985



SHARE OF GROWTH FROM 1982 TO 1985

STABLE SHARE	DECREASING SHARE	INCREASING SHARE
> -2.5% < 2.5%	≤ - 2.5%	≥ 2.5%

Source: Ministry of Revenue, Assessment Services Division and The Hamilton-Wentworth Planning and Development Department.

Greater Hamilton

Population Trends & Projections

Demographics Report 89-1

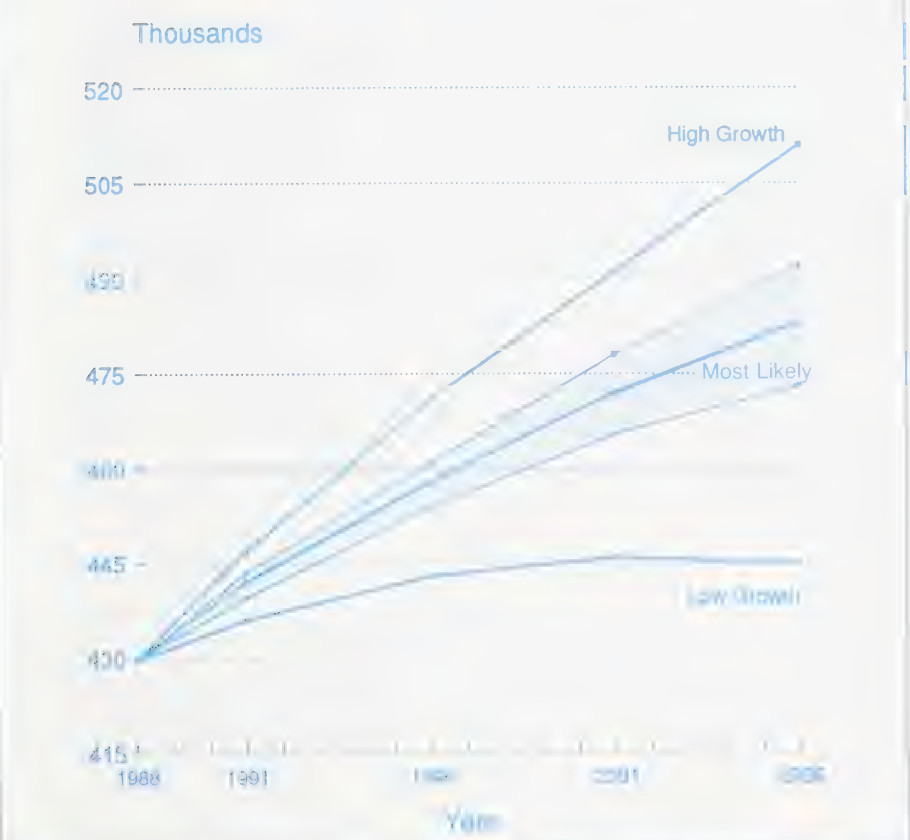
Hamilton-Wentworth Region . Planning and Development Department . Strategic Planning Division

Introduction

The publication Hamilton-Wentworth Population Projections 1988 - 2006 was recently prepared by the Planning and Development Department. It contains age-specific population and household projections for Hamilton-Wentworth and the Area Municipalities. Such information is necessary to assist in infrastructure and service planning.

This bulletin summarizes the trends and projections contained in the larger document.

Population Growth Scenarios
Hamilton-Wentworth, 1988-2006



Note: The most likely range (shaded) recognizes the greater accuracy of forecasts early in the projection period.

Highlights...

- Hamilton-Wentworth's population is forecast to increase to approximately 483,000 (12.5%) by 2006, based on recent trends and opportunities.
- The 2006 population may be as high as 511,000, if rates of fertility and migration increase.
- Net migration to Hamilton-Wentworth was about 900 persons/year between 1985 and 1988. Migration should remain positive, partly due to infrastructure and quality of life improvements and to housing demands in the greater Toronto area.
- International migration is expected to be responsible for almost 60% of future growth. Specialized educational, cultural and other services will be required to accommodate a growing immigrant population.
- The size of the 40-64 year age group is forecast to grow 44% as "baby boomers" age. The 65+ age group will also expand more than twice as fast as the population. Heightened demand for appropriate health, leisure and other services is expected as a result.
- The number of 0-14 year olds is projected to increase 6% by 1996, then decline to existing levels. Demand for children's services may decline after 1996 in older urban areas.
- The number of households is projected to increase from 161,100 to 193,500, with 87% of household growth forecast to occur in the suburban municipalities of Stoney Creek, Ancaster and Flamborough, and on Hamilton mountain.
- The municipalities forecast to experience the largest population increases are Ancaster (81%), Stoney Creek (43%), and Flamborough (39%).

1.0 Growth

Hamilton-Wentworth's population was 434,000 in 1988, an increase of 32,000 persons (8 %) since the Region was formed in 1974. Approximately 75 % of this growth has taken place since 1980.

The Region's average annual growth has rebounded from the low levels of the late 1970s to 1.0% in the last three years.

1.1 Projected Growth

Regional Council recently adopted a set of population projections, based on anticipated fertility and mortality rates and migration trends. In these projections, the population is forecast to increase to 483,000 in 2006 under the "most likely" scenario. This figure is within a most likely population range of 473,000 to 492,000 persons.

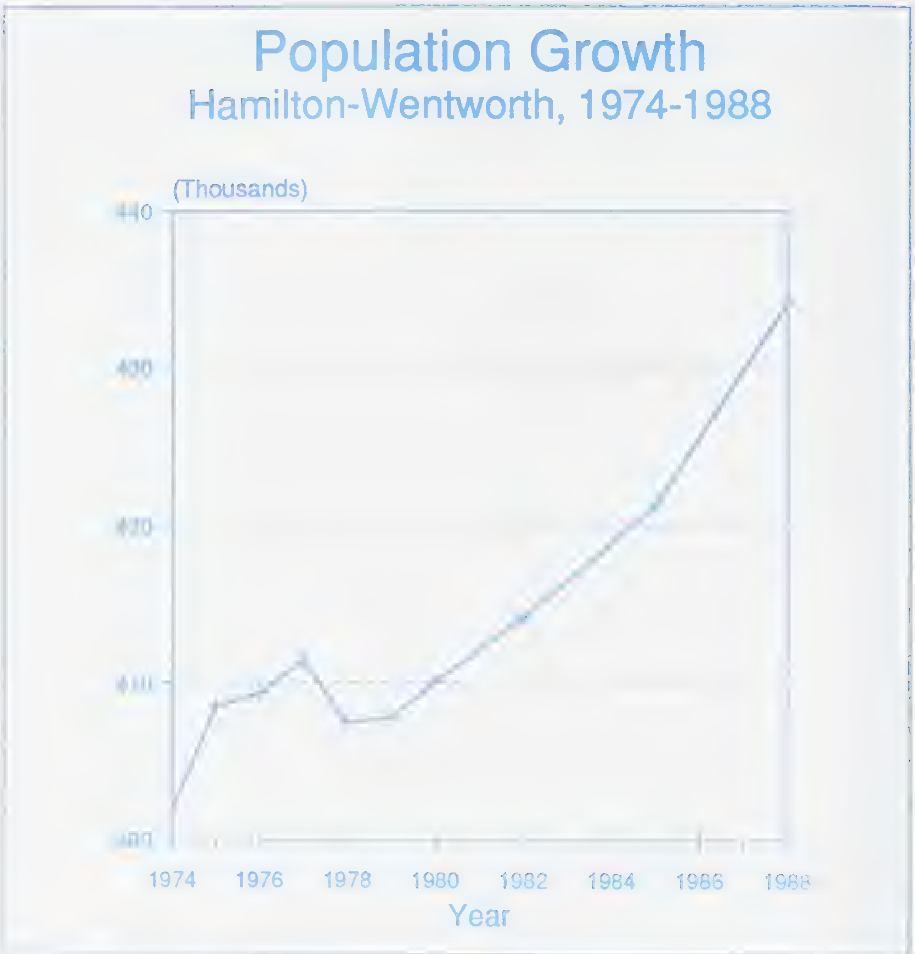
The average growth projected in the most likely scenario is 3,000 persons/year between 1988 and 2006, 50% higher than the 2,000 persons/year experienced between 1975 and 1988.

In recognition of the uncertainty associated with projecting future trends, alternative scenarios were considered. The 2006 population in the high scenario is 511,000, based on conditions of high fertility and migration rates. The 2006 population in the low scenario is 445,000, based on conditions of low fertility and migration.

1.2 Comparative Growth

Hamilton-Wentworth has experienced a slower rate of growth than the Province as a whole since 1956. Growth has concentrated in the Regions immediately surrounding Toronto.

Ontario's population is forecast to grow 21% between 1988 and 2006. This is a larger increase than the increase forecast for the Region. However, Hamilton-Wentworth's rate of growth, compared to Ontario's, increases over the projection period, due to an improved competitive position relative to other Regions.



Source: Ontario Ministry of Revenue, Assessment Division

Average Annual Percent Growth, Actual and Projected
Hamilton-Wentworth and Ontario, 1956-2006

		Hamilton-Wentworth	Ontario
ACTUAL	1956-1961	2.5	2.9
	1961-1966	1.3	2.2
	1966-1971	1.0	[illegible]
	1971-1976	[illegible]	1.4
	1976-1981	0.1	0.9
	1981-1986	0.6	1.1
PROJECTED	1986-1991	1.0	1.7
	1991-1996	0.7	1.2
	1996-2001	0.6	0.9
	2001-2006	0.5	0.8

Source: Ontario Ministry of Treasury and Economics and Hamilton-Wentworth Planning and Development Department.

2.0 Components of Growth

Population changes as a result of the rate of natural increase (births over deaths) and the level of net migrants. Natural increase was the predominant source of the Region's growth between 1951 and 1986. Migration has accounted for an estimated 25% of growth since 1986, due to high levels of Canadian immigration and increased migrants from other Regions in Ontario.

Components of Growth
Hamilton-Wentworth, 1951-1988

	Ave. Annual Net Natural Increase	Ave. Annual Net Migration	Total
1951-56	5,463	4,568	10,031
1956-61	5,920	2,600	8,520
1961-66	5,194	-326	4,868
1966-71	3,753	-11	3,742
1971-76	2,736	-1,214	1,522
1976-81	2,290	-1,899	391
1981-86	2,515	-125	2,390
1985-88 (Est)	2,600	900	3,500

Source: Statistics Canada, Census and Ministry of Revenue, Assessment Division and Province of Ontario, Vital Statistics

2.1 Natural Increase

The rate of natural increase in Hamilton-Wentworth has declined from 6,000 persons/year at the peak of the baby boom in 1957 to 3,000 persons/year at present.

Fertility rates have been below the replacement level since 1975, and are expected to remain low due to: participation of women in the labour force; costs of raising children; preferences for small families; and, increasing divorce rates.

Although the fertility rate has been relatively stable since 1977, the number of births increased as the baby boom reached childbearing age. The number of children aged 0-4 in Hamilton-Wentworth is projected to increase from 27,000 in 1988 to 29,000 in 1996 before declining to 25,000 in 2006, as the baby boom completes its reproductive cycle.

Total Fertility Rate
Ontario 1921-1986

Source: Province of Ontario, Vital Statistics

2.2 Migration

Hamilton-Wentworth experienced net migration of approximately 900 persons/year between 1986 and 1988, an improvement from the migration losses of the 1970s. Migration is projected to remain positive due to federal policy supportive of high levels of international migration, and to the increased attractiveness of Hamilton-Wentworth as a destination for migrants from other Regions. Migration to Hamilton-Wentworth will be influenced by planned quality of life and infrastructure improvements, and by rising housing costs in the Toronto area.

3.0 Age Distribution

The age structure of the population affects the nature of goods and services demanded.

The age structure of the population will change over the next 18 years. The proportion of children is projected to decrease after 1996 as the baby boom moves out of the childbearing years. The aging of the baby boom will result in a smaller proportion of the population in the 20 to 39 year age group and a larger percentage of 40 to 59 year olds. The proportion of seniors should increase due to enhanced life expectancies.

3.1 Children (0-14 years)

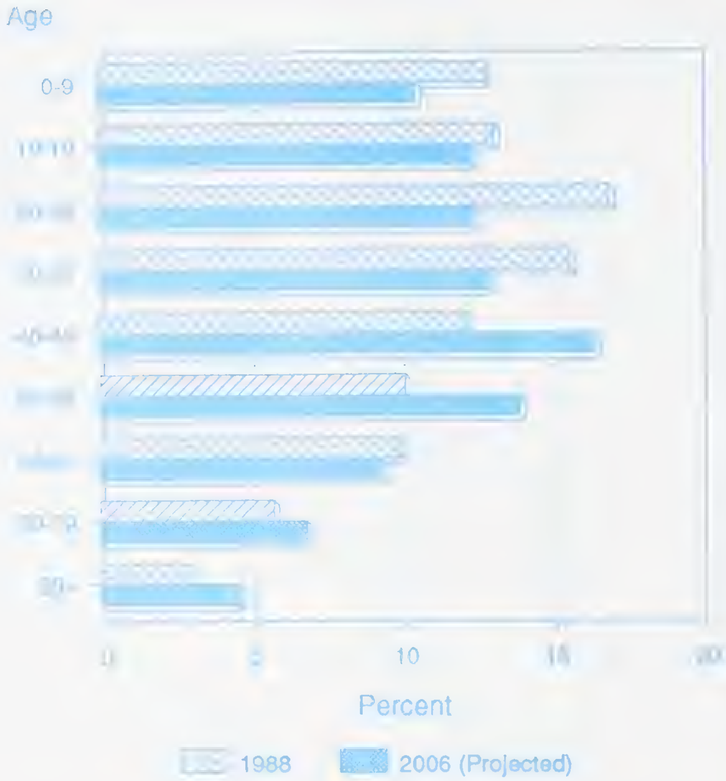
The number of children is projected to increase from 83,000 to 88,000, or 6%, between 1988 and 1996. This increase, which occurs because the bulk of the baby boom generation is in the reproductive years, is commonly referred to as the "baby boom echo." The baby boom echo is of a smaller magnitude than the baby boom, because of current low fertility rates.

After 1996, the number of children is projected to decline to approximately existing levels.

The size of the 0-14 age group (cohort) is sensitive to fertility changes. If the fertility rate increased from 1.7 to 2.0, the projected population of children would be 90,000 in 2006. The projected population of children would be 76,000 in 2006 if the fertility rate declined to 1.4, the present level in Quebec.

The change in the number of 0-14 year olds will require careful policy responses. Demand for youth services will increase to 1996 then fall significantly in some municipalities. It might be prudent to consider designing facilities which are required to meet the demands of the baby boom echo for an alternative future use (e.g. an educational facility may later be used for retraining of older workers). Consideration of alternative uses may also influence the location of new buildings.

Population Distribution by Age Group
Hamilton-Wentworth, 1988 and 2006



Source: Hamilton-Wentworth Planning and Development Department and Ontario Ministry of Revenue

Projected Population Growth by Age Cohort
Hamilton-Wentworth, 1988-2006

	1988	1996	2006	% Change 1988-2006
0-14	82,910	87,900	83,000	0
15-24	64,391	57,700	61,900	-4
25-39	105,721	107,600	92,500	-13
40-64	119,175	136,200	171,700	44
65+	57,270	68,600	73,900	29
TOTAL	429,467	458,000	483,000	12

Source: Hamilton-Wentworth Planning and Development Department and Ontario Ministry of Revenue.

3.2 Adults

The population aged 15-64 is projected to increase from 289,000 to 326,000, or 13%, between 1988 and 2006. The median age of this population, generally considered to be the population from which the labour force is drawn, is expected to increase from 34 in 1988 to 41 in 2006.

The number of persons 15-24 years of age is projected to decline by approximately 10% between 1988 and 1996. Individuals of this age are an important source of new labour market entrants. As potential entrants from this source decline, it is likely that demands for sustained high levels of international migration will continue, in order to maintain recent rates of labour force growth. After 1996, the number of 15-24 year olds begins to increase due to the impact of the baby boom echo.

The number of young adults (25-39 years of age) is projected to decline by 13% between 1988 and 2006, as the baby boom is replaced by the smaller cohort of individuals following them. The result will be fewer young families, renters and first time home buyers, and young, mobile adults in the population.

The projected growth of 44% in the number of 40-64 year olds will impact upon demands for particular leisure, health, education and social services with the same force as this baby boom generation impacted upon the housing market in the 1980s. An increased emphasis upon retraining older workers will be required, as the number of 40-64 year olds in the population of labour force age is projected to rise from 41% in 1988 to 53% in 2006.

3.3 Seniors

The population over 64 years of age is projected to increase by 29% between 1988 and 2006. The size of this group relative to the total population will increase from 13 % to 15%. The most elderly cohort (80+) will grow fastest, from 12,000 to 21,000, or 73 %.

Growth in the elderly cohort will increase demand for services such as transit passes, health care, and accessible housing. In particular, the increase in the number of very elderly will require both more capacity in institutions providing long term care, and additional services for assisting the elderly in remaining independent for extended periods.

Source: Hamilton-Wentworth Planning and Development Department

4.0 Households

The number of households in Hamilton-Wentworth increased from 136,100 in 1976 to 155,600 in 1986 (14%). Household growth has been more rapid than population growth due to declines in average household size, from 3.0 persons in 1976 to 2.7 persons in 1986.

Factors which have contributed to declines in household size include:

- changing attitudes to the traditional family unit;
- opportunities created by an increasingly affluent population;
- low fertility rates;
- increasing divorce rates;
- dramatic growth in the number of persons living alone; and,
- growth in the number of individuals starting first households (25-34 year age group).

4.1 Projected Growth

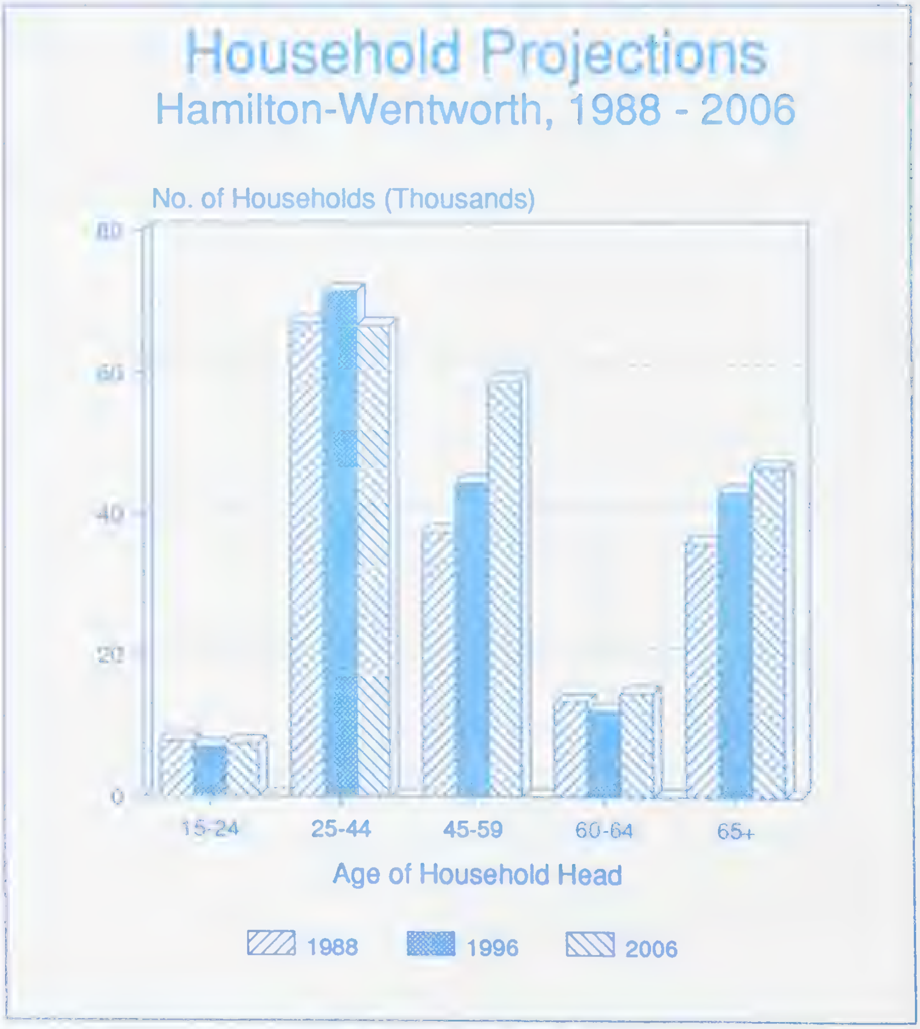
The number of households in Hamilton-Wentworth is projected to increase from 161,100 in 1988 to 193,500 in 2006 (20%). This increase will result from a projected 13 % growth in the population, and a projected decrease in average household size, from 2.7 persons to 2.5 persons.

Household growth is expected to be most rapid amongst households headed by individuals 45-59 years of age, and by the elderly. There will be additional demands for types of housing suitable to the means and needs of these groups.

Population and Household Growth
Hamilton-Wentworth, 1976-86

	Households	Population
1976	136,100	409,500
1981	147,200	411,400
% Average Annual Growth, 1976-1981	1.4	0.1
1986	155,600	423,400
% Average Annual Growth, 1981-1986	1.1	0.6

Source: Statistics Canada, Census



Source: Hamilton-Wentworth Planning and Development Department

5.0 Area Municipalities

Growth patterns have varied among Area Municipalities in the Region. Between 1985 and 1988 Ancaster, Stoney Creek and Flamborough grew most rapidly, with growth of 23%, 9%, and 8%, respectively. The mountain area in the City of Hamilton also experienced rapid growth of 7%. Most municipalities grew faster between 1985 and 1988 than during the early 1980s.

Population Change
Area Municipalities, 1985-1988

	1985	1988	Change	% Chg.
Ancaster	16,542	20,404	3,862	23.3
Dundas	20,081	20,950	869	4.3
Flamborough	25,541	27,688	2,147	8.4
Glanbrook	9,446	9,494	48	0.5
Hamilton	306,090	309,679	3,589	1.2
Stoney Creek	41,964	45,908	3,944	9.4

Source: Ontario Ministry of Revenue, Assessment Division.

Note: Population figures for the City of Hamilton do not include an undercount of approximately 1,600 students from McMaster University.

5.1 Projected Growth

The suburban municipalities are expected to continue to grow most rapidly. Between 1988 and 2006, Ancaster is projected to increase by 81%, Stoney Creek by 43%, and Flamborough by 39%.

The older urban areas, Hamilton and Dundas, are forecast to experience minor growth. However, even net growth of 3,000 persons in Hamilton should result in a net increase of 10,000 households because of changing age structure and household size.

Population Projections
Area Municipalities, 1988-2006

	Base Population (May, 1988)(1)	Low	Most Likely(2)	High
Ancaster	19,700	[illegible]	35,800	[illegible]
Dundas	20,600	[illegible]	22,000	[illegible]
Flamborough	27,100	[illegible]	37,700	[illegible]
Glanbrook	9,500	[illegible]	11,800	[illegible]
Hamilton	307,200	[illegible]	310,700	[illegible]
Stoney Creek	45,300	[illegible]	64,600	[illegible]

(1) The population projections contained in the document Hamilton-Wentworth Population Projections, 1988-2006 were based on the enumeration of May, 1988, the most recent data available at the time of production. The Regional population during that assessment was 429,500. The year-end population for 1988 was 434,000.

(2) There is greater uncertainty associated with population projections at the Area Municipal level than for larger areas, as a result of the numerous factors which impact development patterns. These factors include: characteristics of new development, neighbourhood capacity and household size, availability and location of serviced land, image, and momentum.

5.2 Age Specific Growth

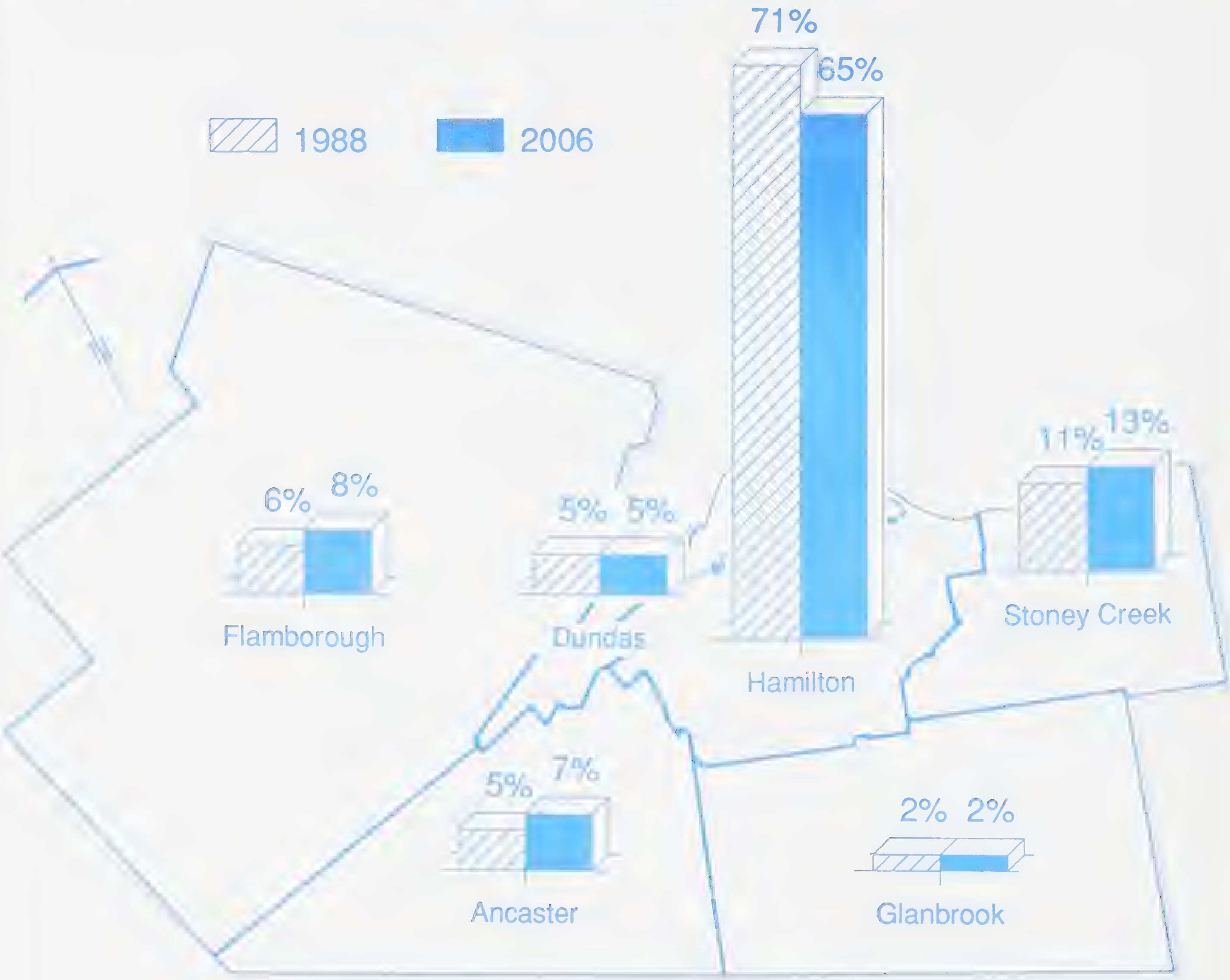
The age structure of the population is projected to change in each of the area municipalities.

The number of children aged 0-19 is projected to decrease in Dundas and Hamilton, and increase in Flamborough, Stoney Creek and Ancaster. The population aged 20-64 will likely increase most in the suburban municipalities. The proportion of seniors will rise significantly in all municipalities, with the largest percentage growth forecast for Glanbrook in recognition of the planned development of two retirement communities.

6.0 Conclusion

Change in the size and composition of the population affects demand for residential land, infrastructure and housing, and for leisure, health, transit, and other services. Projections contained in this bulletin provide a basis for planning for future growth.

Actual and Projected Distribution of Population by Area Municipality
Hamilton-Wentworth, 1988 and 2006



This is one in a series of information bulletins produced by the Regional Planning Branch of the Planning and Development Department, Regional Municipality of Hamilton-Wentworth.

Other Bulletins currently available:

- Greater Hamilton Population (Report 87-1)
- Greater Hamilton Labour Force (Report 87-2)
- Greater Hamilton Construction Trends (Report 87-3)
- Greater Hamilton Industrial Development (Report 87-4)
- Greater Hamilton Large Office Inventory (Report 88-1)
- Greater Hamilton Regional Centre (Report 88-2)

For further information, please contact Julie Bergshoeff at 526-4348.

Note: More detail on population trends and projections is available in the document Hamilton-Wentworth Population Projections, 1988-2006.

Greater Hamilton
Population Trends & Projections
Demographics Report 93-1

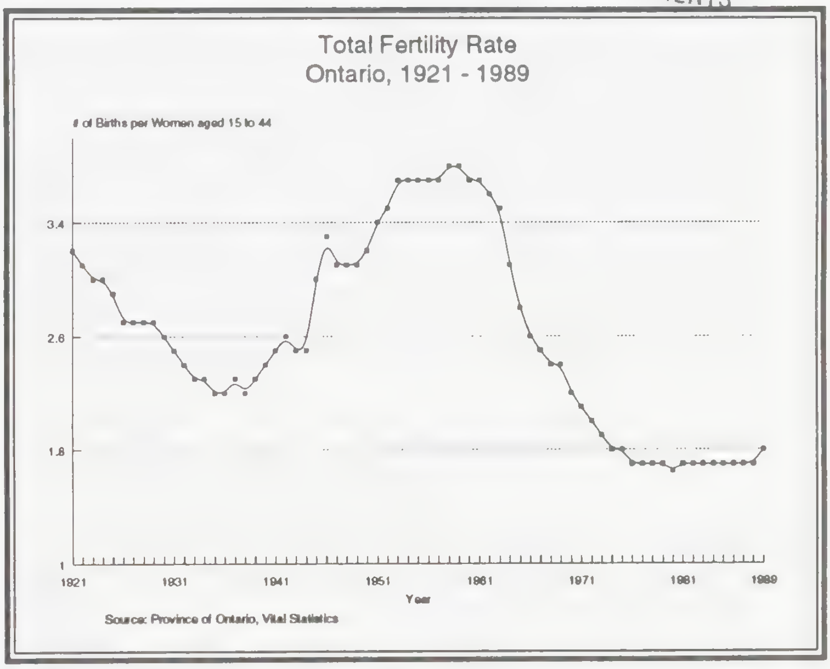
INTRODUCTION

This bulletin summarizes the report Hamilton-Wentworth Population, Household and Labour Force Projections 1991-2021. This report was adopted for planning purposes by Regional Council in December 1992. A thirty year time frame was chosen for the projections to be consistent with the Region's Vision 2020 documents. The report provides an overview of the factors that will influence growth variables.

COMPONENTS OF POPULATION CHANGE

Improving Life Expectancy

The mortality rate (deaths per thousand per year) dropped steadily between the 1920s and 1960s due to improvements in public health and sanitation. Since the 1960's the rate has been relatively steady at 7.2 deaths per thousand with the exception of a recent decrease in the mortality rate of the elderly. For the projections, male life expectancy at birth is assumed to rise from 74.1 years in 1990 to 78.3 by 2015, while life expectancy for females will rise from 79.5 years to 84.5 over the same period.



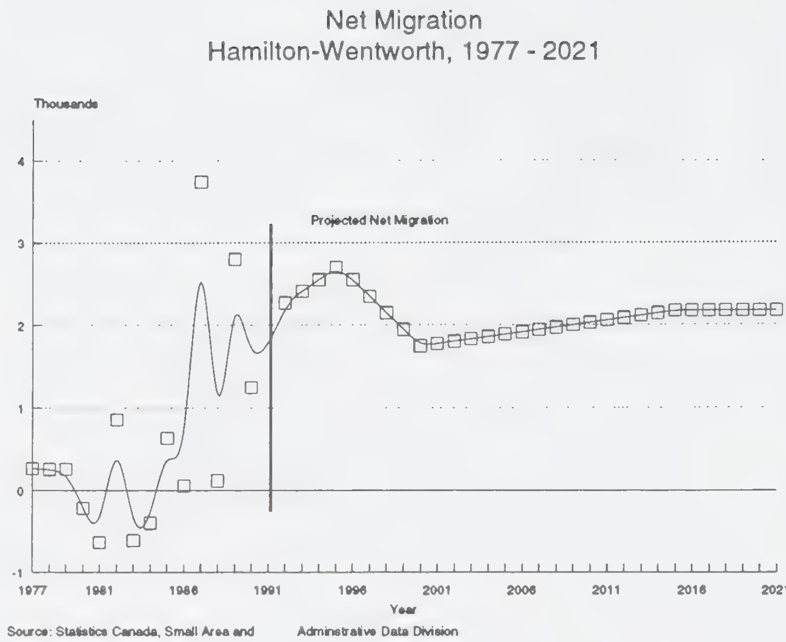
Low Fertility Rates

The fertility rate is the average number of children women have in their lifetime. Historically, the rate moved down during the 1920s and 1930s, moved up again through the 1940s and 1950s, and dropped sharply during the 1960s. Since the mid-1970s the rate has been fairly steady at 1.67 births per women. Recently the rate increased slightly to 1.76 as women in their early 30s are having more children. The projections assume that fertility rates will stay at 1.76 births per woman until 1996 and then drop back to 1.68 births per woman over the long term.

High Short-Term Migration

Future migration is the most difficult factor to predict. The number of people coming into the Region from outside the country is directly related to federal immigration policy which can change quickly.

Based on the past share of immigrants who settle in the Region, short-term federal immigration policies, and long term averages, net annual international migration is assumed to remain high at 3,150 people until 1995, decline to average levels of about 1,650 until 2000, and begin a slow increase to 2,070 by 2015 and then stay at that level.

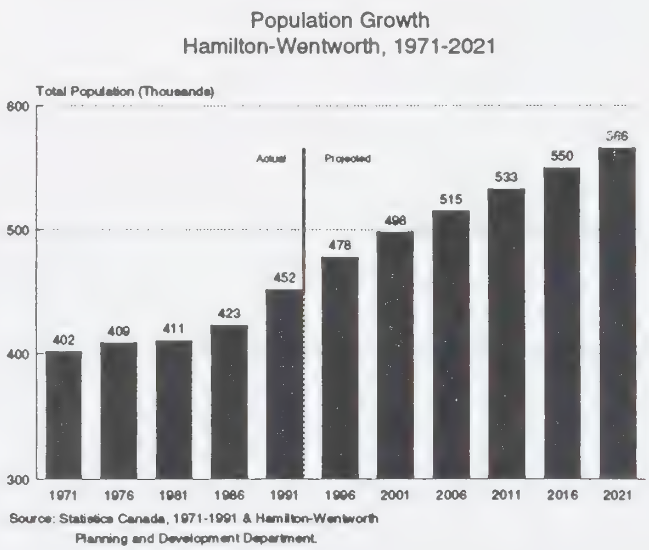


Within the country, people move between provinces due to changing economic conditions, job opportunities and quality of life concerns. Net annual interprovincial migration to the Region is assumed to remain constant at an annual average of 100 migrants through the entire projection period. Net annual intraprovincial migration is projected to increase from minus 800 people to 0 by the year 2000 and then remain at this level for the remainder of the projection period. These assumptions are optimistic and will depend on the availability of job opportunities relative to other provinces, growth in the Greater Toronto Area and the general quality of life in our communities.

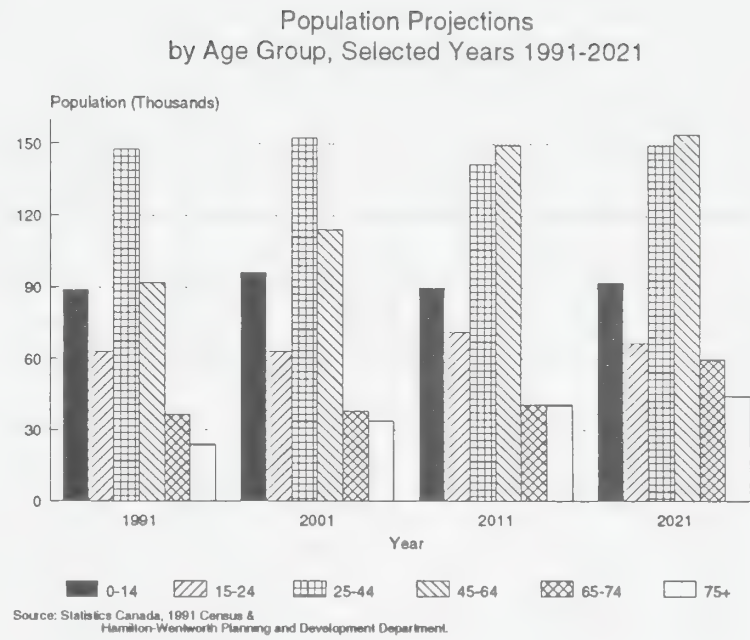
Typically, the age of migrants coming to the Region has been fairly evenly split among young adults (35%), youth (35%) and children (30%). The projections assume that these proportions will persist.

PROJECTED GROWTH

The Regional population is projected to grow from 451,665 in 1991 to 566,465 in 2021. The increase of 114,800 people is a 25% increase over 1991. Total migration will account for over half the increase in population. The population will grow fastest in the 1990's due to the assumed high levels of international migration and high rate of births. An average of 4,650 more people per year is anticipated during the 1990's.



AGE DISTRIBUTION

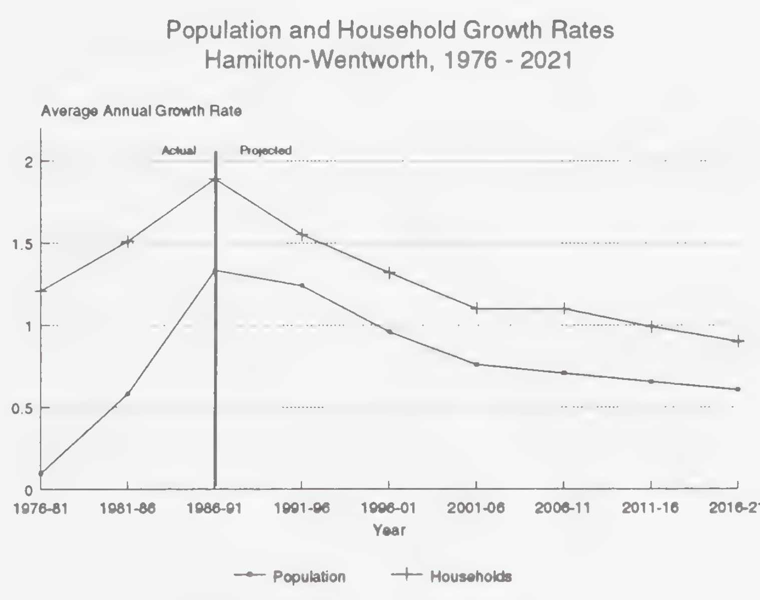


The most notable feature of the projections is the aging of the population. In 1991 half the population was under 33 years old, by 2021 this median age is expected to be 41. The large group of people born between 1940 and 1960, the "baby boom", will move into middle age between 1991 and 2011.

The 65-74 age group begins to grow substantially after 2011 when the baby boom generation starts entering retirement age.

The number of 15-24 year olds decreases between 1991 and 1996 from 63,000 to 61,095, and then increases to 71,370 by 2016 as the children of the baby boom generation become teen-agers. Although the number of children (0-14) remains around 90,000 their proportion of total population is reduced from 20% to 16%.

HOUSEHOLDS



Between 1986 and 1991, population growth in the Region was 6.5% while household numbers went up by 9%. Growth in the number of households, and therefore the need for housing unit construction, is expected to outpace population growth. 37% more households are expected to be formed in the Region by 2021, while the population grows by 25%. 63,110 new households will boost totals from 169,120 in 1991 to 232,230 in 2021. Growth will be highest in the years 1991-1996 (2,380 annually). Changes in the average number of people living together in a household are also expected. The average household size has been decreasing across the province. Divorce rates and large increases in single parent families are part of the reason for decreasing household size. Average household size in the Region decreased from 3.01 in 1976 to 2.66 in 1991. Average household size is projected to decrease from 2.66 to 2.44 persons per households between 1991 and 2021.

Planning for Geographic Differences in Growth

Each of the area municipalities will experience growth in both population and households but the rate of increase is not expected to be the same across the whole Region due to the available supply of land and the type of units built. Hamilton will see the highest absolute growth in households but Ancaster, Flamborough, Stoney Creek and Glanbrook are expected to experience much higher proportional growth than the older, more developed areas of Dundas and Hamilton.

	1991		2021	
	Population	Households	Population	Households
Ancaster	21,990	6,880	42,995	15,190
Dundas	21,870	7,770	25,515	10,170
Flamborough	29,615	9,625	52,925	19,465
Glanbrook	9,725	3,080	15,975	6,320
Hamilton	318,500	125,525	342,100	149,025
Stoney Creek	49,970	16,245	86,995	32,055
TOTAL (REGION)	451,665	169,125	566,465	232,225

LABOUR FORCE

Over the last thirty years the labour force has grown substantially. This is not only a result of population increase, but also due to significant increases in the percentage of women interested in paid work. Between 1966 and 1991 female participation rates in Ontario jumped from 35% to 60% while male participation rates declined from 75% to 71%. Regional participation rates closely follow provincial trends. It is expected that participation rates for different age/sex groups will continue to change between 1991 and 2001:

- the 25-64 female age group will increase their participation to equal male participation rates except for women in their child-bearing years;
- the 15-24 age group rates will increase slightly; and
- the 55-64 age group will decline due to early retirement.

The projections assume that after these changes take place, participation rates will remain constant at 2001 levels for the rest of the projection period. Under these assumptions the labour force will increase from 240,125 people in 1991 to 312,240 in 2021. Growth in the labour force will be highest between 1991 and 2001 as the participation of women increases from 46% to 50%. Growth in the labour force will slow considerably and show little increase after 2011 as many workers reach retirement age and the number of 15-24 years old who are the main source of new workers declines.

FUTURE PROJECTIONS

These projections reflect a number of assumptions which may or may not be borne out over time. The Planning and Development Department will monitor actual growth and, following the publication of census statistics every five years, review assumptions and prepare up-dated projections.

THE REPORT "Hamilton-Wentworth Population, Household and Labour Force Projections, 1991-2021" is available from the
Regional Planning Branch 119 King St. West 14th Floor
P.O. Box 910, Hamilton, Ontario
L8N 3V9
(416) 546-4124

GREATER HAMILTON

LABOUR FORCE

ECONOMICS - REPORT 87-2

Hamilton-Wentworth Region - Planning and Development Department - Strategic Planning Division

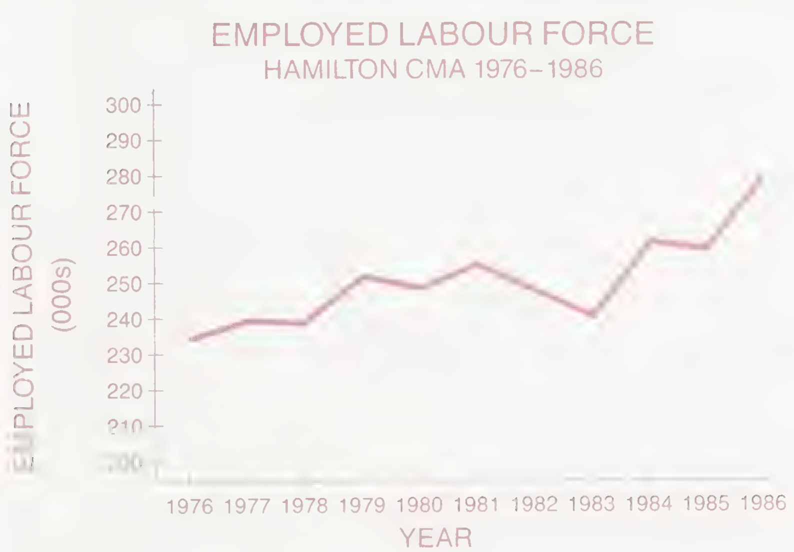
INTRODUCTION

The size and composition of the employed labour force reflect the employment patterns of local business and industry. This bulletin provides a profile of the employed labour force and summarizes some of the trends that have characterized its recent growth.

The information in this bulletin relates to the Hamilton Census Metropolitan Area (CMA), which consists of all of Hamilton-Wentworth plus Burlington and Grimsby. Where information on specific trends was not available at the CMA level, Provincial summaries were used .

The employed labour force includes all residents of the Hamilton Census Metropolitan Area who have jobs either within the CMA or in neighbouring cities and municipalities.

The primary data sources used in the labour force analysis in this bulletin are; the monthly Statistics Canada sample survey of the labour force and the Census of Canada.



Sources: Statistics Canada, Labour Force Annual Averages 1980 - 1983 Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

HIGHLIGHTS...
THE HAMILTON CMA'S EMPLOYED LABOUR FORCE

- The size and composition of the employed labour force in 1986 was 280,500, 20 percent higher than in 1976.
- Employment remains specialized in manufacturing relative to the Ontario economy, despite recent increases in non-manufacturing employment.
- The employed labour force in the service sector increased dramatically between 1985 and 1986.
- The fastest growing occupational group between 1980 and 1986 was that of managerial and professional.
- Approximately 71 percent of part-time workers are female. Many of the part-time positions are in service, sales and clerical occupations.
- In 1986, 24 percent of the employed labour force possessed a post-secondary certificate or a university degree.
- Unemployment rates have been decreasing steadily since 1983, an indication of the economy's recovery from the recession of the early 1980's.
- Forty-two percent of the participants in the labour force are female, although female participation rates in the CMA remain lower than in Ontario.

GROWTH

In 1986, there were 280,500 employed people resident in the Hamilton CMA. This was 7.2 percent more than in 1985.

The number of employed grew by approximately 20 percent in the period from 1976 to 1986. However, this growth was interrupted by a 1.0 percent decrease in 1980, a 0.9 percent decrease in 1985, and more severe decreases of 2.7 percent in 1982 and 2.2 percent in 1983.

AVERAGE ANNUAL GROWTH IN THE EMPLOYED LABOUR FORCE

Year	Ontario (% Growth)	Hamilton CMA (% Growth)
1980	1.5	−1.0
1981	2.9	2.2
1982	−2.5	−2.7
1983	0.7	−2.2
1984	3.6	7.5
1985	3.7	−0.9
1986	3.5	7.2

Sources: Statistics Canada, Labour Force Annual Averages 1980–1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

COMPARATIVE GROWTH

The 7.2 percent growth in 1986 compared favourably to the 3.5 percent growth rate achieved by the Province. This is the second year since 1980 that the employed labour force has grown faster in the Hamilton CMA than in the Province of Ontario.

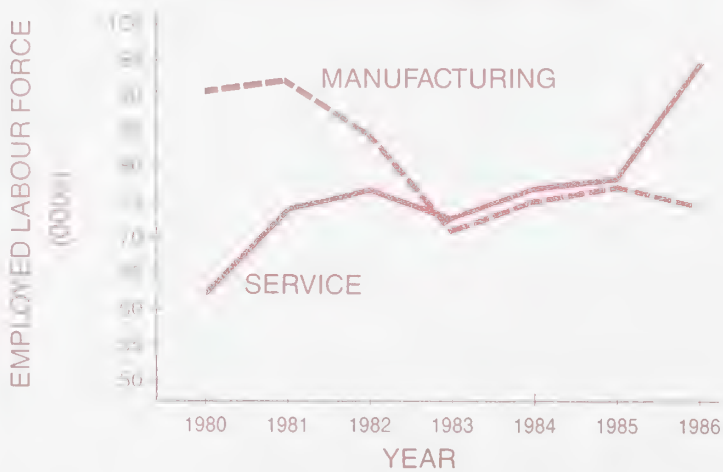
The 1982 recession was responsible for a more dramatic decline in employment in Hamilton than in Ontario. This is not surprising, as the recession was led by a sharp decline in manufacturing, the sector of traditional employment concentration in the area. Even in 1983, when the effects of the recession on employment in Ontario were levelling off, there was a 2.2 percent decline in the employed labour force in the Hamilton CMA.

INDUSTRY TRENDS

Employment in the service sector has increased significantly since the recession. In 1983, the employed labour force in the service sector surpassed the employed labour force in the manufacturing sector for the first time. In 1986, the labour force employed in the service sector increased dramatically, climbing to approximately 93,400.

Employment in the manufacturing sector has increased only moderately since the drastic decreases of 1982 and 1983. In 1986, the labour force employed in the manufacturing sector averaged 76,200, down from 91,600 in 1981.

EMPLOYED LABOUR FORCE
SERVICE AND MANUFACTURING INDUSTRIES
HAMILTON CMA 1980–1986



Sources: Statistics Canada, Labour Force Survey Sub-Division, Household Surveys Division, Microfiche Files, (1980–1986)

EMPLOYMENT SPECIALIZATION

In spite of a decreasing concentration of employment in manufacturing, the local economy remains specialized in manufacturing relative to the Provincial economy.

Since 1980, Hamilton's degree of specialization relative to the Ontario economy has increased in the government, service, and transportation, communication, and utilities sectors.

A location quotient was used in this analysis to measure employment specialization. When an industry sector's share of total employment is greater in the Hamilton CMA than in Ontario, the location quotient is greater than 100 and employment specialization exists.

Note: *The service sector encompasses the education, health, and business and personal service industries. The service sector labour force includes individuals of all occupations working in any of the service industries. By contrast, service occupations are classified on the basis of the duties and responsibilities of a job and include occupations in food and beverage preparation, lodging, and personal and protective services.*

Sources: Statistics Canada, Labour Force Surveys Sub-Division, Microfiche Files (1980–1986), Labour Force Annual Averages 1980–1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

OCCUPATIONAL GROWTH

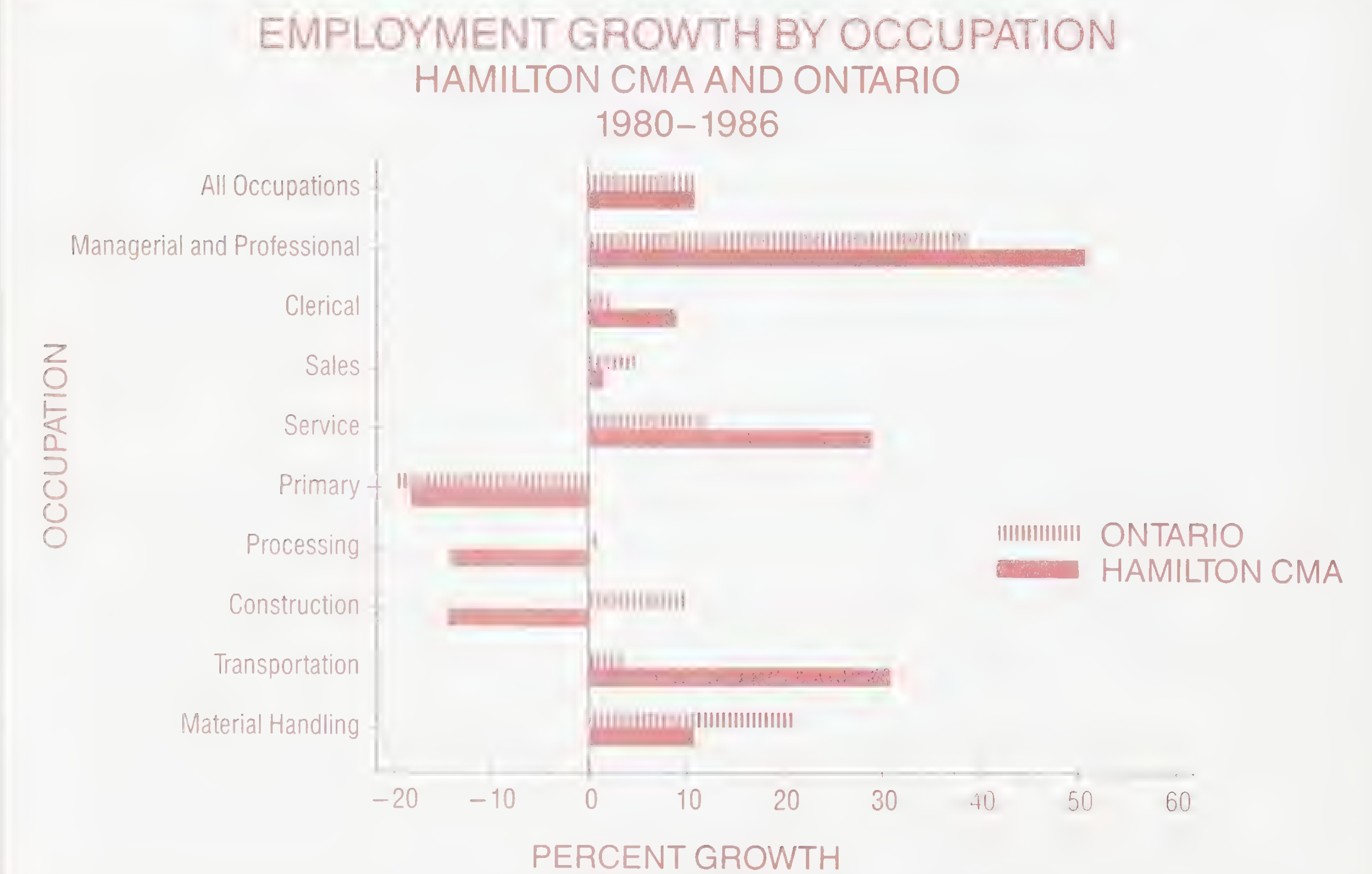
The recession and subsequent recovery had a profound impact on occupational growth. Between 1980 and 1986, the employed labour force in the Hamilton CMA declined in the primary, processing, and construction occupational groups.

The fastest growing occupations over this time period were managerial and professional. Employment in transportation and service occupations also rose, increasing by more than 25 percent over the six years.

The occupational shifts were perhaps more dramatic in the Hamilton CMA than in Ontario due to the traditional concentration of processing occupations in the local manufacturing sector. Managerial and professional, service, transportation, and clerical jobs all grew faster in the CMA than they did in the Province.

The transformation to an information economy will continue into the forseeable future. The 1984 Ontario Task Force on Employment and New Technology identified six occupational groups as most likely to increase their share of employment between 1985 and 1995. Four of these groups fall into the classification of managerial and professional occupations. The six groups are:

- services
- natural sciences, engineering, and mathematics
- managerial and administrative;
- clerical;
- social sciences;
- artistic, literary, and recreation.



Sources: Statistics Canada, Labour Force Survey Sub-Division, Household Surveys Division, Microfiche Files (1980–1986), Labour Force Annual Averages 1980–1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

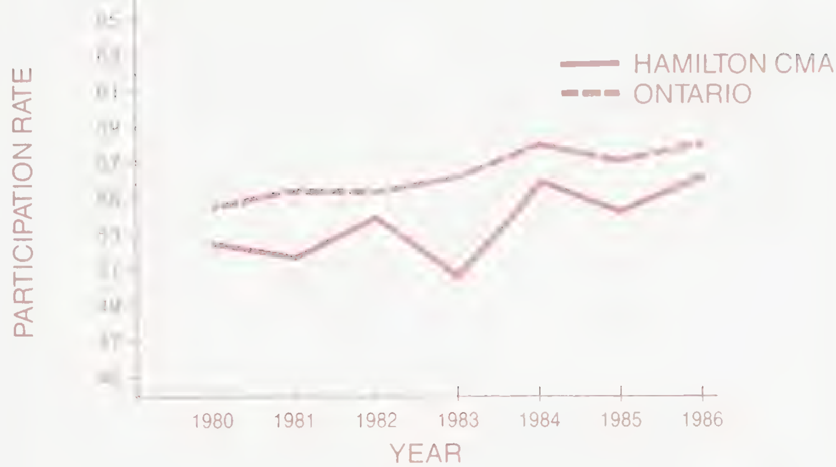
FEMALE PARTICIPATION RATES

An important component of post-World War II employment growth has been the increasing number of women in the labour market. The female participation rate indicates the percentage of women 15 years of age and over who are active in the labour force, either employed or seeking employment.

The female participation rate in the Hamilton CMA reached its highest level ever in 1986, when it rose to 55.8 percent from 54.6 percent in 1985. The rate dropped sharply between 1982 and 1983 when jobs were scarce; it rebounded quickly as the economy improved.

Female participation rates have not yet reached the levels recorded for the Province of Ontario, where the 1986 female participation rate averaged 58.5 percent.

FEMALE PARTICIPATION RATES
HAMILTON CMA AND ONTARIO 1980–1986



Sources: Statistics Canada, Labour Force Annual Averages 1980 - 1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

PART-TIME EMPLOYMENT

The changing industrial and occupational composition of the workforce has been accompanied by an increasing incidence of part-time employment. Twenty-eight percent of employment growth in Ontario between 1980 and 1986 was as a result of a rising number of part-time workers.[1]

Females dominate part-time employment. Thirty percent of the 116,200 females in the employed labour force work part-time.

Clerical, sales, and service occupations have a greater concentration of part-time workers than the labour force as a whole. In the Hamilton CMA, 40 percent of the employed labour force in service occupations is part-time. In contrast, about 98 percent of the employed labour force in processing occupations work full-time.

[1]The Statistics Canada definition of part-time employment is used in this analysis. Part-time employment refers to those persons who usually work less than 30 hours per week and who consider themselves to be working part-time.

PART-TIME AND FULL-TIME EMPLOYED LABOUR FORCE BY SEX
HAMILTON CMA 1986

	% of Employed Labour Force	
	Full-Time	Part-Time
Both Sexes	83	17
Males	91	9
Females	70	30

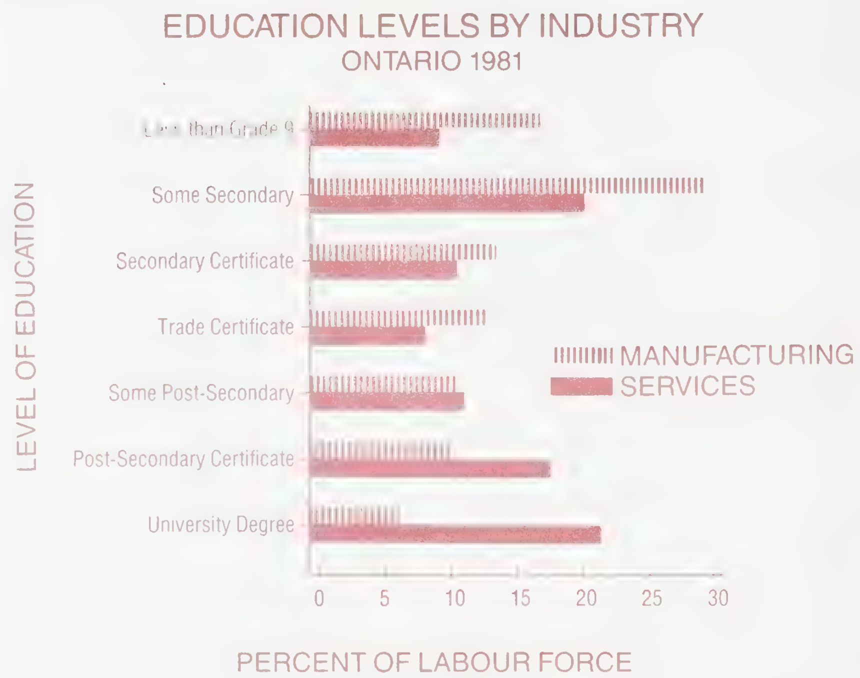
Estimates prepared by Statistics Canada, Labour Force Survey Sub-Division, Household Surveys Division, Reference Number 887010

EDUCATION AND EMPLOYMENT

A highly educated labour force is necessary in an increasingly knowledge-intensive economy. Between 1980 and 1986, there was a 44 percent increase in the employed labour force possessing a post-secondary certificate. The employed labour force with a university degree grew by 43 percent. Over this period there was a decrease in the number of employed with less than Grade 9 education.

The increasing demand for individuals with higher levels of education is associated with employment growth in the service sector. In 1981, 22 percent of the service sector labour force in Ontario possessed a university degree. This is in contrast to the 6 percent of the labour force in the manufacturing sector with similar qualifications.

As service sector growth opens up opportunities for those with higher levels of education, the decrease in the manufacturing sector's share of employment will limit opportunities for those with less education. In 1981, seventy-three percent of the labour force in the manufacturing sector lacked any post-secondary training, making this sector an important source of employment for individuals who have not attended a post-secondary institution. At the same time, 51 percent of the service sector labour force had some post-secondary education.



Sources: Statistics Canada, Census of Canada, Catalogue 93-966, (1981)

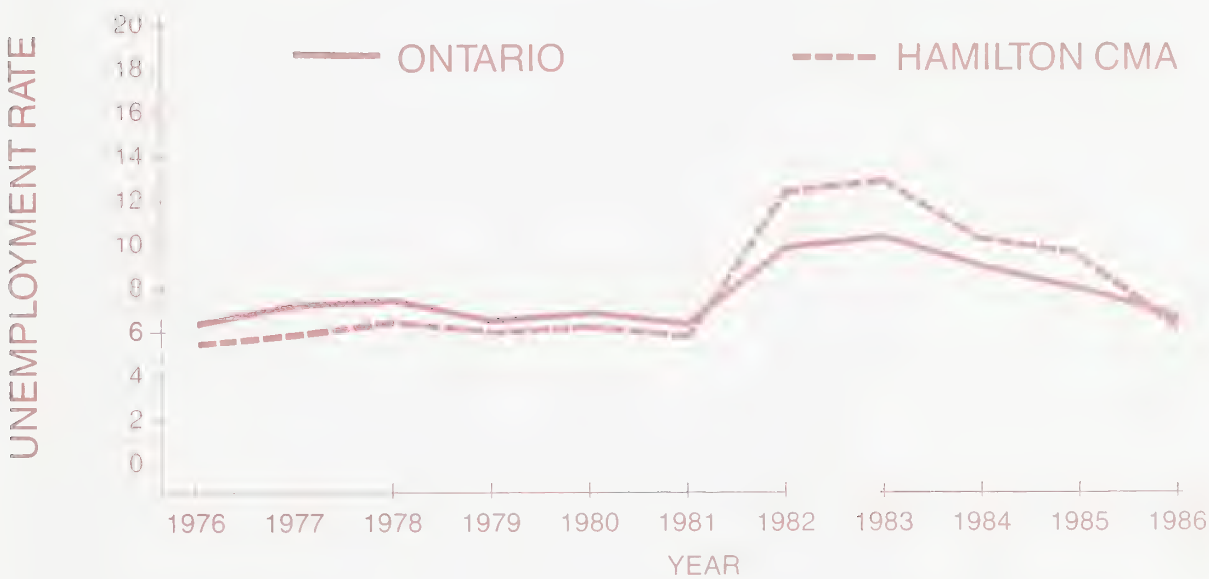
UNEMPLOYMENT HISTORY

The rate of unemployment in an area is a measure of the extent to which the economy is providing, or failing to provide, employment for those who desire work. In 1986, the average annual unemployment rate of 6.9 percent in the Hamilton CMA was the lowest experienced since the onset of the recession in 1981. For the first time since 1981, the local unemployment rate was lower than the unemployment rate in Ontario.

The unemployment rates in Ontario and in the Hamilton CMA have followed the same general trend during the past decade, although the Hamilton CMA suffered a more severe rate of unemployment during the economic recession, a condition that took several years of generally favourable employment growth to reverse.

The CMA experienced higher unemployment rates than did the Province because its economy was more concentrated in the manufacturing sector. The Provincial economy, with a different mix of industry sectors, was less vulnerable to this sectoral decline.

UNEMPLOYMENT HISTORY
HAMILTON CMA AND ONTARIO 1976–1986



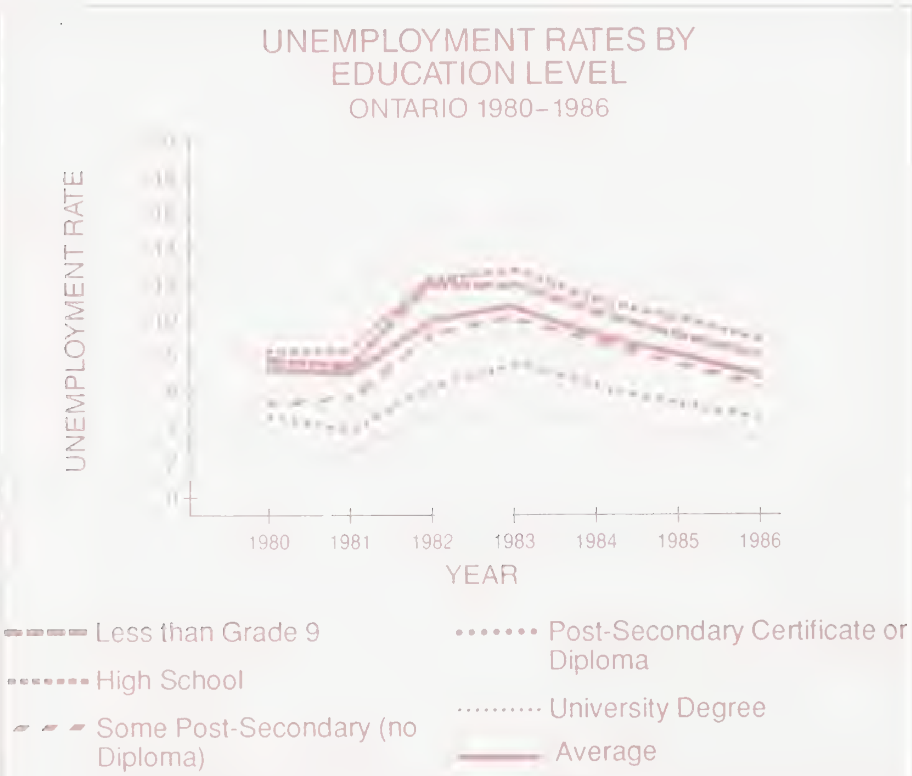
Sources: Statistics Canada, Labour Force Annual Averages 1980–1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

UNEMPLOYMENT PROFILE

Relatively low levels of unemployment mask the difficulties in obtaining employment encountered by certain groups in the labour force.

A group requiring attention is that of individuals with lower levels of education. Between 1980 and 1986, the annual unemployment rates in Ontario for those lacking a post-secondary education were considerably higher than the norm. During the recession of the early eighties, unemployment rates for all educational categories rose, but the rise was more dramatic for those with a high school diploma or less. Although this data relates to the Province of Ontario, it is likely that the pattern in Hamilton was similar.

Unemployment rates also vary by sex and age. In 1986, females in the Hamilton CMA experienced a rate of unemployment of 8.6 percent, 51 percent higher than the male unemployment rate of 5.7 percent. Youth are especially vulnerable to unemployment and, in 1986, individuals 15-24 years of age encountered an unemployment rate of 11 percent .



Sources: Statistics Canada, Labour Force Annual Averages, 1980 - 1983, Catalogue 71-529, Labour Force, Catalogue 71-001 (1984, 1985, 1986)

SKILLED LABOUR REQUIREMENTS

Many jobs in the manufacturing and construction sectors require workers with a particular combination of skills. Although these sectors have not played an important role in employment growth during the 1980s, job opportunities do exist. In addition to the openings created through normal staff turnover, there are jobs in construction as a result of the recent building boom. A demand for new skills has also emerged in the manufacturing sector as a result of recent technological changes.

Between March 31, 1986 and April 1, 1987, the Canada Employment and Immigration Centres in the Hamilton CMA registered approximately 500 vacancies for truck drivers, over 400 for carpenters, and over 300 for welders. More than 100 job vacancies were posted in other manufacturing occupations, including machinists and related occupations.

In some occupations, the number of vacancies posted exceeded the number of placements made, indicating a possible shortage of workers with related skills. The Canada Employment and Immigration Centre records reflected such possible shortages in the occupations of motor vehicle mechanic, brick and stone masonry, and plumbing and pipefitting between March 31, 1986 and April 1, 1987.

Regional Centre
Employment Trends
Economic Report 89-3

Hamilton - Wentworth Region • Planning and Development Department • Strategic Planning Division

Introduction

This bulletin profiles the labour force employed in the Regional Centre in 1989 with comparisons to 1982. It summarizes the basic sectoral and demographic characteristics concerning the extent and quality of employment growth in the Regional Centre. The data was obtained in 1982 and 1989 through surveys of all business sites identified within the Regional Centre.

The 1989 survey is the first stage in the development of an ongoing Regional employment data base. During each of the next several years an additional geographic area of the Region will be surveyed and added to the data base along with an annual update of all previously surveyed areas. This information will be reported in future publications.

The survey results are stored in a data base maintained by the Research and Information Section of the Department of Planning and Development and are available for specific research applications.

The Regional Centre encompasses 508 hectares and is bounded by the Niagara Escarpment (south), the Hamilton Harbour (north), Queen St. (west), and Victoria St. (east).

Highlights...

- Approximately 42,000 people are employed by the 2,400 business sites in the Regional Centre. This is an increase of 1,500 jobs since 1982.
- The Regional Centre employment profile is showing signs of adjustment reflecting the key findings of the Regional economic strategy.
- Retail and office activities account for 67% of total employment. Growth in these sectors has been flat. However, a larger proportion of office workers are now employed in the service sector.
- Employment in the institutional sector has increased 45% and now accounts for one of every five jobs in the Regional Centre.
- Manufacturing employment declined 30% and has shifted towards light manufacturing operations. This is consistent with the national and Regional trends identified in the Regional economic strategy.
- Employment in the health field rose 17% to approximately 6,500 jobs. Two Regional Centre hospitals provide three-quarters of this employment. Hospital expansions are the primary reason for growth.
- Small business (20 or fewer employees) employed 27% of workers in 1989. The number of small business employees has declined 1.3% since 1982.
- Male employment declined 11% since 1982 to 17,835 and now represents 42% of employees.
- Female employment has grown 18% to 24,435 or 58% of all employees. Approximately 68% of this increase was in part-time employment.
- Employment growth is concentrated within the four neighbourhoods of Central, Durand, Corktown and Beasley; the remaining neighbourhoods experienced decline.

1.0 Employment Profile

The survey results show a decline in manufacturing employment and related growth in other sectors. This is consistent with the Regional economic strategy prepared in 1986 which recognized the national employment trend away from manufacturing towards service industries. Also recognized were national trends in small business, part-time and female employment. The strategy recommended increasing employment among growth sectors to promote sustainable Regional economic growth.

1.1 Office Employment

The office sector provides 47% of Regional Centre employment. At 1%, overall growth has been flat. However, office employment is shifting from manufacturing businesses towards financial and business services.

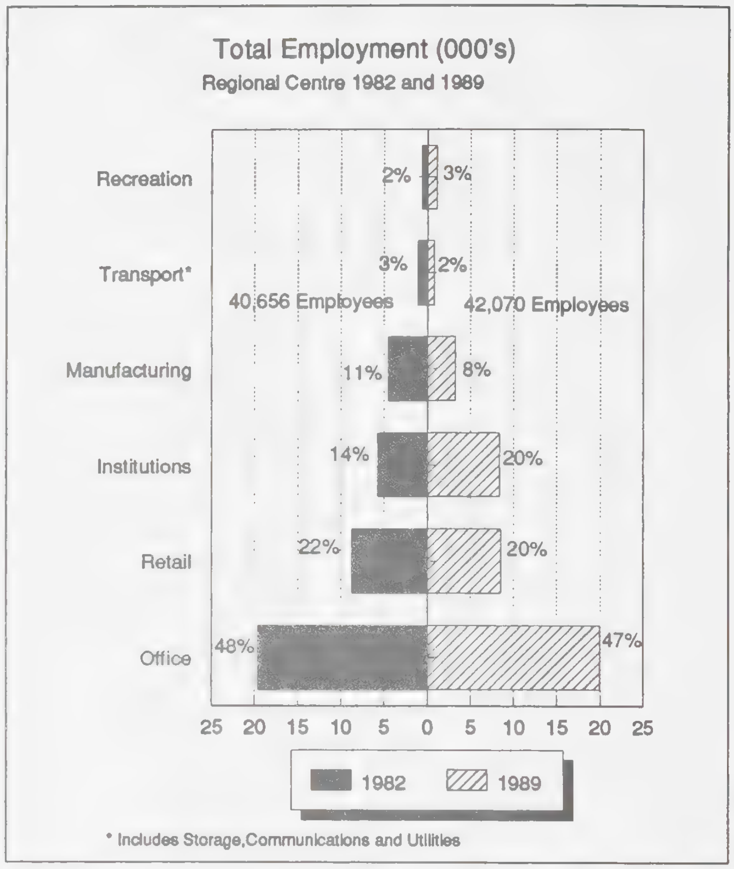
Employment in finance, insurance and real estate (F.I.R.E.), which grew 1.2% between 1980 and 1985 in Ontario, had an overall growth of 20% between 1982 and 1989 in the Regional Centre.[1] One office employee in five in the Regional Centre is now employed in this field.

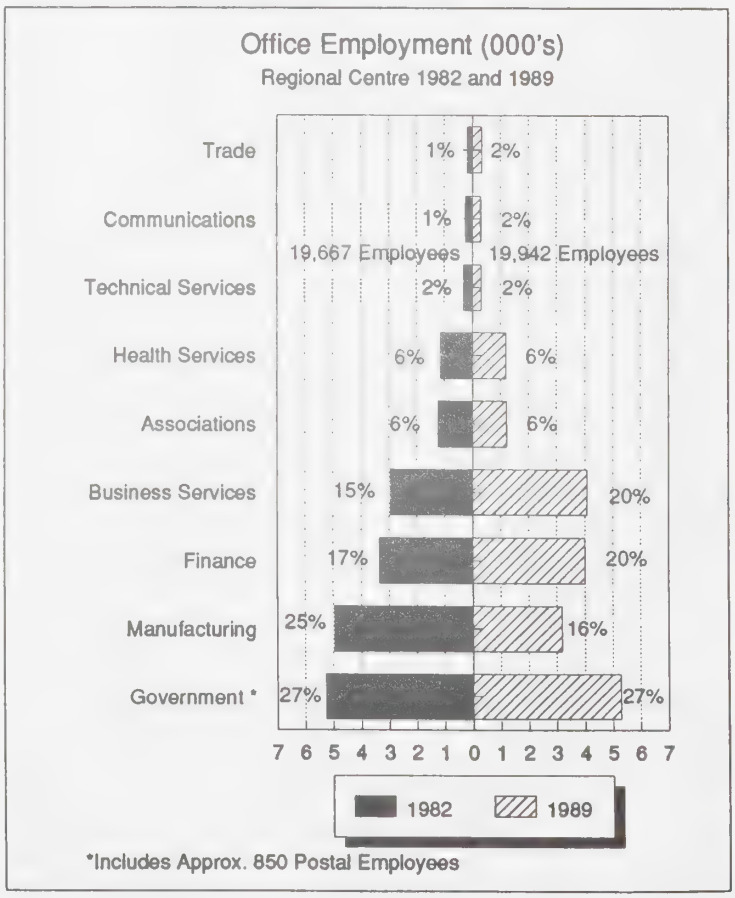
Business services (including lawyers, accountants, consultants and advertising agencies) is one of the fastest growing sectors in the Regional Centre economy. Employment within this component has increased 38% from 2,953 in 1982 to 4,088 employees in 1989. In relation to total employment growth, business services increased from 15% of total Regional Centre office employment to 20%. This reflects the Region's economic objective of promoting human capital-intensive professional employment. Phase II of the CIBC development will provide additional office space for this growing segment.

In 1982 one-quarter of office employees worked for manufacturing businesses. A 36% decline since then has reduced manufacturing office employees to 16% of Regional Centre office employees.

Government continued to account for 27% of all office workers and 13% of all employment opportunities in the Regional Centre.

1 *Building on Strength: An Economic Strategy for Hamilton Wentworth, Planning and Development Department. June 1986, p.4.*



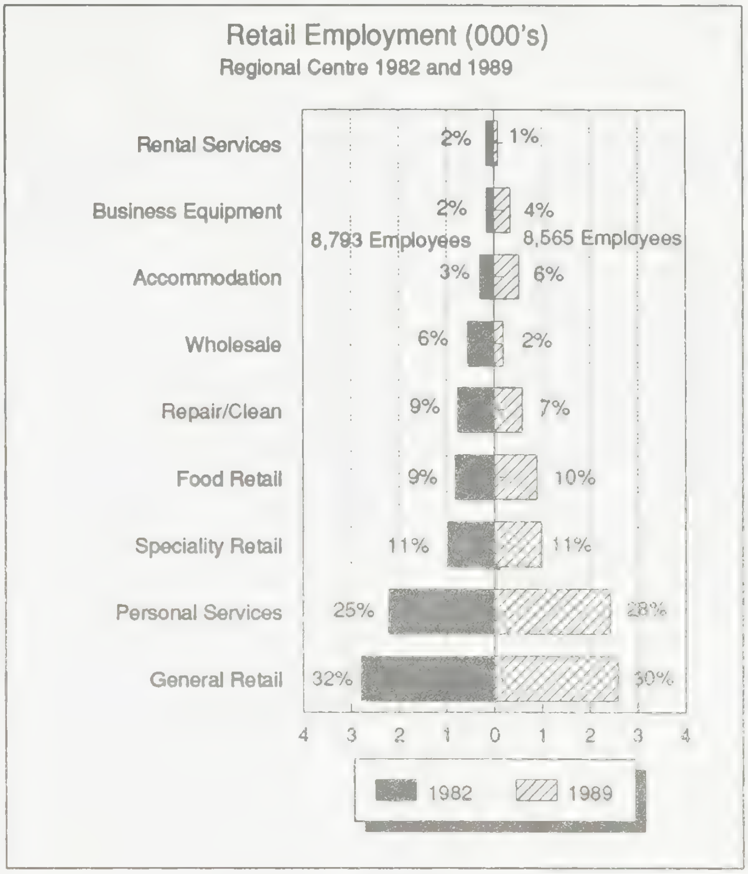


1.2 Retail Employment

There are several distinct retail shopping districts in the Regional Centre including: Jackson Square, Hess Village, Downtown Promenade, International Village, and Jamesville.

Retail employment has declined slightly since 1982. In 1989, 8,565 workers or one in five employees were employed by retailers. The small loss in employment is likely explained by the recent closure of Robinson's department store and could be offset by the expansion of the Eaton's Centre and several residential and commercial mixed use projects currently in process in the Regional Centre.

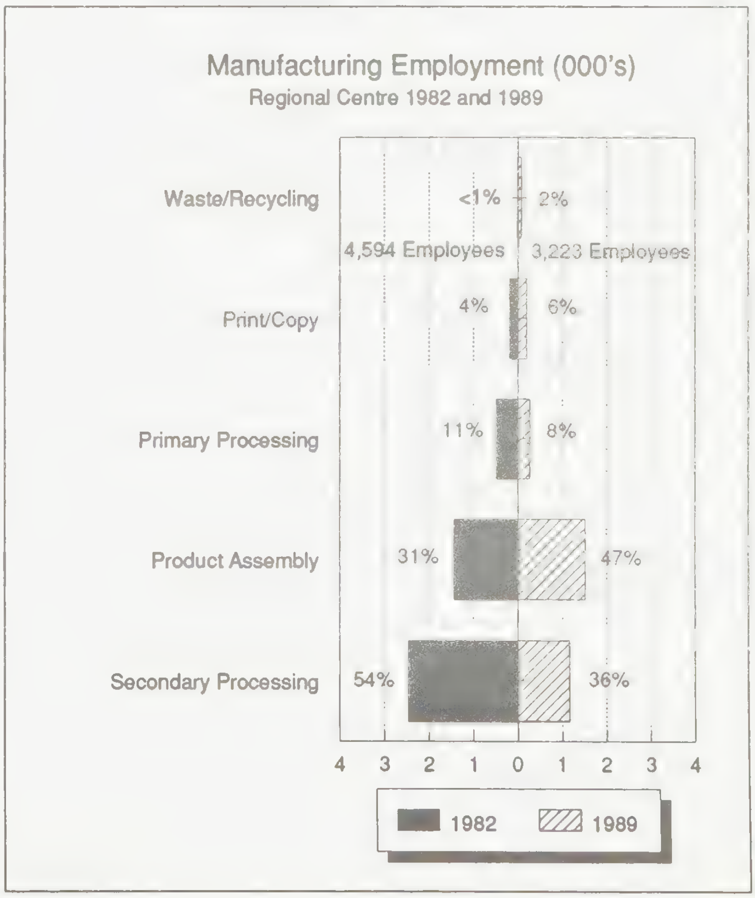
Retail employment has been redistributed from businesses that retail products towards businesses that retail services. Combined employment by personal service retailers (restaurants, taverns, beauty shops, etc.) and business sales/service retailers (equipment servicing, signage, etc.) has grown 15% since 1982 while product retailing has declined 3%. Employment by wholesaling operations has also declined significantly.



1.3 Manufacturing Employment

The Region's economic strategy acknowledges the national employment trend towards light manufacturing and service-oriented businesses. This trend is reflected in Regional Centre employment.

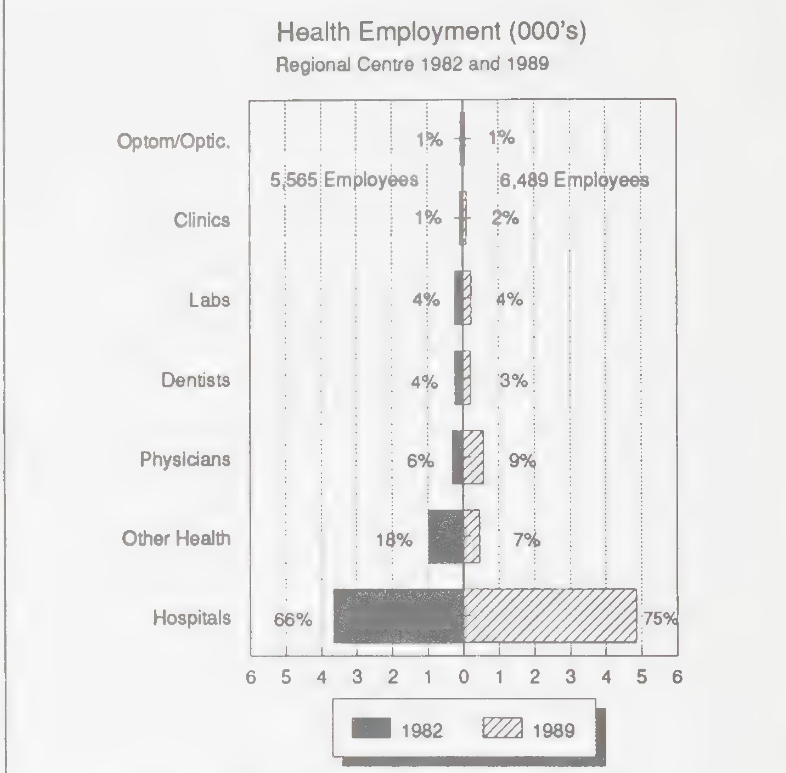
Manufacturing employment in the Regional Centre has declined 30% since 1982. In 1989, financial services, business services and government each employed more workers than the 3,223 people engaged in manufacturing activities. Almost half of these manufacturing employees are now engaged in light manufacturing and assembly of goods such as clothing, furniture and electrical equipment - an increase from 31% in 1982.



1.4 Health Employment

The health sector is a major employer in the Region. In the Regional Centre 6,489 employees, or 15% of all workers, are employed in this sector. This is a 17% increase since 1982. Two new health sector projects currently under development in the Regional Centre include a medical office building and a laboratory technology centre.

Both Regional Centre hospitals have undergone expansion since 1982. In 1989, these hospitals accounted for three-quarters of health sector employment, an increase from 66% in 1982. The number of workers employed by physicians' offices has grown from 6% of health employees to 9%. Employment generated by the remaining health professions has remained constant since 1982.



1.5 Service Employment

"Service employment" includes all employees except those employed by businesses which the Standard Industrial Classification system considers agricultural, mining, or manufacturing oriented. Regional Centre service sector employment has increased 14% since 1982 compared to the 12% average growth rate in Ontario's service sector employment.[1]

As a percentage of total employment, the Regional Centre service sector employed 81% of all workers in 1982 and 90% in 1989. The largest employment components in this sector are: Health and Social Services (21%), Government (17%), Retail Trade (15%), F.I.R.E. (12%), and Business Trade (10%). These are also the most actively growing service components since 1982.

Conversely, employment through the wholesale service trade has declined. The 413 job opportunities available in this segment in 1989 represent only one-half of 1982 employment levels.

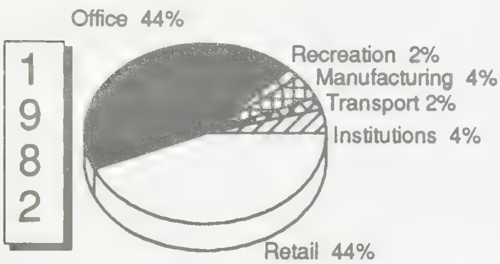
Service Sector Employment
Regional Centre 1982 and 1989

SERVICE SECTOR	1982	%	1989	%	Change
Wholesale Trade	813	2%	413	1%	(49%)
Retail Trade	5,107	15%	5,790	15%	13%
F.I.R.E.*	3,558	11%	4,481	12%	26%
Business Trade	2,626	8%	3,947	10%	50%
Government	5,045	15%	6,322	17%	25%
Education	1,103	3%	1,162	3%	5%
Health/Social Services	5,913	18%	7,904	21%	34%
Accom/Food/Beverage	2,575	8%	2,569	7%	0%
Other Services	6,363	19%	5,118	14%	(20%)
TOTAL	33,103	100%	37,706	100%	14%

* Finance,Insurance,Real Estate

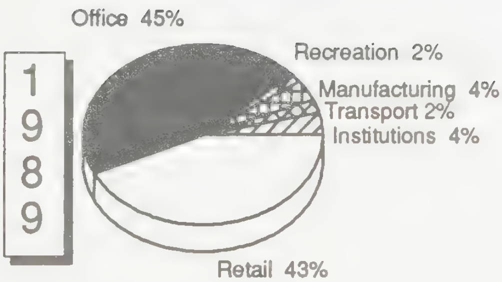
1 *Characteristics of the Service Sector in the Region of Hamilton -Wentworth. Department of Economic Development. September 1989, p.6.*

Small Business Employment Regional Centre 1982 and 1989



Employment By Activity And Business Size Regional Centre 1982

BUSINESS ACTIVITY	# of Employees						
	1-20	21-50	51-100	101-500	501-1000	1001+	TOTAL
Institutions	492	465	361	829	0	3,652	5,799
Manufacturing	479	266	725	1,874	1,250	0	4,594
Offices	4,968	2,663	2,875	6,371	1,244	1,546	19,667
Recreation	202	105	171	190	0	0	668
Retail	4,947	1,494	926	1,426	0	0	8,793
Transport*	273	251	165	446	0	0	1,135
TOTAL	11,361	5,244	5,223	11,136	2,494	5,198	40,656



Employment By Activity And Business Size Regional Centre 1989

BUSINESS ACTIVITY	# of Employees						
	1-20	21-50	51-100	101-500	501-1000	1001+	TOTAL
Institutions	455	375	138	1,338	1,249	4,846	8,401
Manufacturing	423	252	592	1,332	624	0	3,223
Offices	5,076	3,404	1,778	5,334	4,350	0	19,942
Recreation	174	137	280	550	0	0	1,141
Retail	4,820	1,383	854	961	547	0	8,565
Transport*	263	64	91	380	0	0	798
TOTAL	11,211	5,615	3,733	9,895	6,770	4,846	42,070

* Includes Storage,Communications and Utilities

2.0 Small Business Employment

Small business is defined as any employment site where 20 or fewer workers are employed. Across Canada, from 1978 to 1986, small business was responsible for two-thirds of employment growth. In fact, 60% of national growth was generated by firms with five or fewer employees.

In the Regional Centre, however, small business provided 150 fewer jobs in 1989 than 1982. The corresponding number of small business sites has declined 8% since 1982 to 2,071 locations. Nearly 85% of this reduction in employment was experienced by small retailing businesses which declined in number from 1,100 in 1982 to slightly less than 1,000 sites in 1989.

This decline in the number of small business sites and corresponding employment in the Regional Centre may reflect the fact that small business growth has generally been more prevalent in areas outside the downtown core, instead of in existing built up areas such as the Regional Centre. (Detailed analysis of where small business is locating will become available as subsequent editions of this employment survey are administered throughout the Region during the next several years.)

Thus employment growth in the Regional Centre has been generated by larger businesses. Total employment at business sites employing between 500 and 1,000 employees has almost tripled since 1982. Most of this growth occurred in the office and institutional sectors.

3.0 Demographic Profile

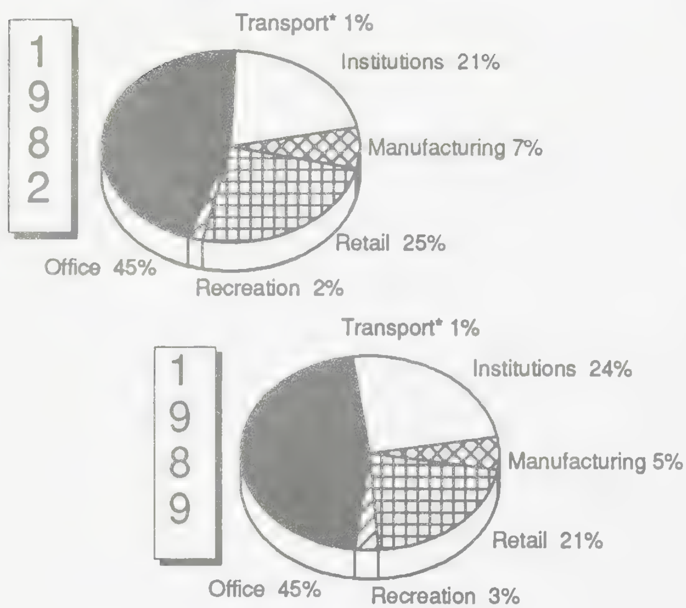
The 1980's saw a substantial increase in the number of women entering the work force and a stronger commitment to the implementation of affirmative action programs. These trends have probably affected the profile of male and female employment in the Regional Centre.

3.1 Male Employment Profile

Two male employment trends are evident in the Regional Centre. First, male employment decreased in all sectors except institutional and recreational activities. Total male employment declined 11% from 19,926 in 1982 to 17,635 in 1989 with full-time employment among males declining 18%. Over half of this decrease occurred in manufacturing. Offices continue to employ 50% of male workers.

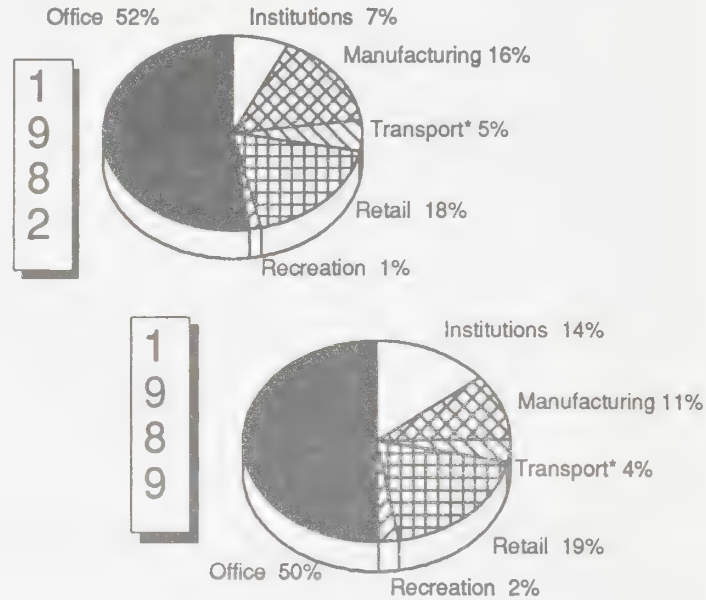
Secondly, male part-time employment has almost doubled since 1982 and now accounts for 15% of all male workers. Males now make up 30% of all part-time employment, an increase from 27% in 1982. Across Canada in 1988, 7.7% of males were employed part-time and males accounted for 28% of total part-time employment.

Female Employment Characteristics
Regional Centre 1982 and 1989



* Includes Storage, Communications and Utilities

Male Employment Characteristics
Regional Centre 1982 and 1989



* Includes Storage, Communications and Utilities

3.2 Female Employment Profile

Female employment increased 18% to 24,435. In 1982 females held 51% of all jobs; this figure has risen to 58%. Slightly more than one-quarter of this rise was full-time employment growth.

An increase in office employment accounts for almost 50% of female employment growth while institutional employment growth represents almost 42% of the increase.

One in four female workers in the Regional Centre were employed part-time in 1989, an increase from 17% in 1982. Female part-time employment represents 70% of total part-time employment, a decline from 73% in 1982.

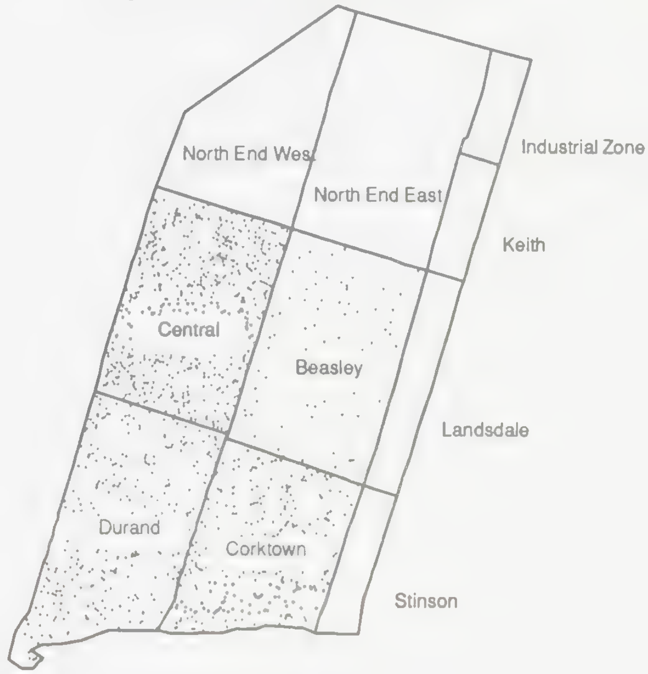
Trends are similar across Canada where 25.2% of employed women in 1988 worked part-time. As a whole, Canadian women represented 72% of all part-time employment.

Employment By Neighbourhood
Regional Centre 1982 and 1989

NEIGHBOURHOOD	1982	1989	% Change
Central	10,824	13,846	28%
Beasley	10,094	10,510	4%
Corktown	6,105	7,594	24%
Durand	2,977	4,429	49%
North End West	284	243	(14%)
North End East	1,784	1,587	(11%)
Industrial Zone*	458	108	(76%)
Keith*	2,377	523	(78%)
Landsdale*	4,770	3,000	(37%)
Stinson*	983	230	(77%)
TOTAL	40,656	42,070	3.5%

* Neighbourhoods only partially contained in Regional Centre

Distribution Of Employment Growth By Neighbourhood
Regional Centre 1982 to 1989



1 Dot represents 5 new employees

4.0 Geographic Distribution

Due to the clustering of similar land use activities, two geographic employment trends are evident. Employment growth since 1982 has been restricted to those areas where service-oriented firms predominate. Thus employment is becoming more geographically concentrated within the Regional Centre.

The Regional Centre is partitioned into six distinct neighbourhoods and parts of four adjacent neighbourhoods. Employment growth occurred in the four principal neighbourhoods of Central, Durand, Corktown and Beasley. Combined, these areas contain 86% of all Regional Centre employment and account for all employment growth.

The Central neighbourhood accounted for almost one-half of all growth, with Beasley, Corktown, and Durand neighbourhoods responsible for remaining growth. The remaining six areas, which contain 14% of all employment, experienced a 47% decline. These areas have traditionally contained a higher manufacturing component.

Three Business Improvement Areas (BIA's) are situated within the Regional Centre (Downtown Promenade, International Village, and Jamesville). These retail-oriented organizations encourage economic growth through the creation, promotion and preservation of appealing retail environments.

Approximately 67% of all retail employees and 52% of retail sites are located in BIAs. Downtown Promenade is the largest BIA. It contains over one-eighth of all Regional Centre businesses and as much employment as the other two BIA's combined.

This is one of a series of information bulletins produced by the Strategic Planning Division of the Planning and Development Department, Regional Municipality of Hamilton - Wentworth.

Other Bulletins currently available:

- Greater Hamilton EconomicTrends (Report 89-2)
- Greater Hamilton Population Trends & Projections (Report 89-1)
- Regional Centre Development (Report 88-2)
- Greater Hamilton Large Office Inventory (Report 88-1)
- Greater Hamilton Industrial Development (Report 87-4)
- Greater Hamilton Construction Trends (Report 87-3)
- Greater Hamilton Labour Force (Report 87-2)
- Greater Hamilton Population Trends (Report 87-1)

For further information, please contact Fred Rovers at 546-2153

GREATER HAMILTON
Large Office Inventory
DEVELOPMENT - REPORT 88-1

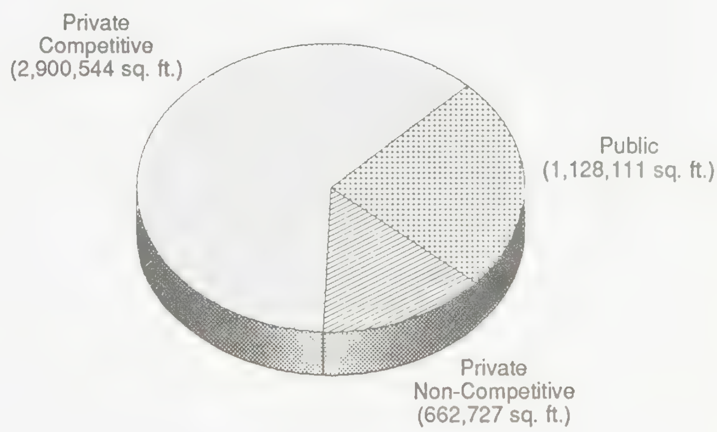
Hamilton-Wentworth Region • Planning and Development Department • Strategic Planning Division

This bulletin describes buildings with large office spaces of over 10,000 square feet (sq. ft.) in the Regional Municipality of Hamilton-Wentworth, and outlines changes from January 1985 to December 1987.

There are 87 buildings providing 4.7 million sq. ft. of space. Fifty-four "private competitive" buildings offer leasable space on the open market and represent 62% of total space. Sixteen "private non-competitive" buildings, where space is used completely by the private owner, provide 14% of total space. Seventeen "public" buildings, where space is owned and used by public agencies, provide the remaining 24% of total space.

Additions to the total large office inventory from 1985 to 1987 included four new private competitive buildings (244,000 sq. ft.) and the expansion of one private competitive building (15,000 sq. ft.). There were no additions to private non-competitive buildings or to public building space. Building locations and sizes are shown on pages 5 to 7 of this bulletin.

Large Office Buildings Hamilton-Wentworth (1987)



Highlights...

Good Leasable Space Throughout Hamilton-Wentworth

- There are 2.9 million sq. ft. of private competitive space in Hamilton-Wentworth. Thirty-nine buildings are in downtown Hamilton, thirteen elsewhere in Hamilton, and two in other area municipalities.
- Space is available for new tenants in all cost ranges and in all locations.

High Net Absorption Rates for Leasable Space

- 440,000 sq. ft. of additional space were leased from 1985 to 1987. Nearly all net absorption occurred in buildings renting at over $14 net per sq. ft.
- Overall vacancy rates decreased from 28.3% in 1985 to 17.9% in 1987.
- The limited supply of "prime" space suggests excellent opportunities for new office construction or renovation of existing lower cost buildings.

Prime Downtown Space at Very Reasonable Rents

- There are 1.1 million sq. ft. of space in five buildings, renting at over $14 net per sq. ft., in downtown Hamilton. Average rental cost for this "prime" space is $16 net per sq. ft. - half the cost of comparable space in downtown Toronto.
- The most expensive downtown office space is $19.50 net per sq. ft.

Large Supply of Inexpensive Space

- 356,000 sq. ft. of downtown office space in ten buildings rents at between $10 and $14 net per sq. ft. Nearly 1.1 million sq. ft. of downtown space in 24 buildings rents for $10 net per sq. ft. or less.
- 369,000 sq. ft. of space in 15 buildings outside the downtown rents at between $5 and $13 net per sq. ft.

Sources: Telephone survey of leasing agents, December 1987; Field survey and assessment rolls review, Summer 1987; Canadian Real Estate - 1987 (Royal LePage).

1.0 Private Competitive Office Space

"Private competitive" large office space in Hamilton-Wentworth totalled 2,900,544 sq. ft. at year-end l987. Space in these 54 buildings represents 62% of all large office space.

Thirty-nine of these buildings are located in the Central Area of the City of Hamilton and l5 are in other areas of the Region. Average net rent in l987 was $9.34 net per sq. ft.

The overall vacancy rate in Hamilton-Wentworth significantly declined from l985 to l987, even though four new buildings came on the market, one returned to the market after extensive renovations, and one underwent major expansion.

Private Competitive Office Space Hamilton-Wentworth

Year - End 1987

Area	Net Rent Range ($/sq. ft.)	Number of Buildings	Total Floor Area (sq. ft.)	Average Size (sq. ft.)	Average Net Rent ($/sq. ft.)
Central Area	$14 & over	5	1,102,208	220,442	16.04
	$10 to $14	10	356,237	35,624	11.69
	up to $10	24	1,072,902	44,704	7.63
	all rents	39	2,531,347	64,906	9.75
Other Areas	all rents	15	369,197	24,613	8.27
All Areas	all rents	54	2,900,544	53,714	9.34

Changes 1985 to 1987

Area	Net Rent Range ($/sq. ft.)	Vacancy 1985 (sq. ft.)	%	Vacancy 1986 (sq. ft.)	%	Vacancy 1987 (sq. ft.)	%	85 - 87 Net Absorbtion (sq. ft.)
Central Area	$14 & over	399,000	43.4	137,000	14.9	143,120	13.0	439,528
	$10 to $14	64,500	20.4	19,380	6.1	48,221	13.5	45,279
	up to $10	181,817	17.5	137,116	13.2	254,150	23.7	- 49,833
	all rents	645,317	28.2	293,496	12.8	445,491	17.6	434,974
Other Areas	all rents	83,380	27.0	59,309	19.2	73,595	19.9	9,785
All Areas	all rents	728,697	28.3	352,805	13.8	519,086	17.9	444,759

1.1 Central Area

Thirty-nine buildings in the Central Area, with a total leasable floor area of 2,53l,347 sq. ft., account for 84% of all private competitive large office space in Hamilton-Wentworth. The total vacancy rate decreased considerably from 28.2% in l985 to l7.6% in l987, even with significant office space additions. However, overall vacancy rates in the Central Area remain well above the average forecast for major Canadian cities in l987.

Current absorption rates in relation to vacant space* suggest there is an approximate 26 month supply of large office space in the Central Area. However, estimated "years of supply" for the two most expensive categories of buildings are less than the normal two-year time frame for construction of new office buildings. This suggests that excellent opportunities exist for development of additional high amenity/cost space. Space could be added through construction of new buildings or through renovations to existing lower cost buildings, many of which are well located and have good basic facilities.

Buildings Over $l4 Net Per Square Foot

Five buildings are concentrated near Lloyd D. Jackson Square. All are recently built or extensively renovated. The highest net rent is $l9.50 net per square foot. The average net rent of $l6 is approximately half the average for comparable space in downtown Toronto and below the average for major cities across Canada. Net rents increased an average of l8% from l985 to l987.

The overall vacancy rate declined considerably from l985 (the first year of operation for the Standard Life Building) to l987, despite the addition of Commerce Place (l83,648 sq. ft.) in l987. Currently, there is an approximate eight month supply of space available in this rent range.

* Dividing the amount of vacant space in a period by the absorption of vacant space in that period is used to determine "years of supply" - the number of years by which existing space will be occupied if no additional space is made available. "Years of supply" is considered a more reliable indicator of market health than the traditional examination of changes in vacancy rate over time.

Buildings Between $10 and $14 Net Per Square Foot

Ten such buildings, typically older and somewhat smaller than those in the "prime" category,are located throughout the Central Area. Amenities and access are generally good.

In this category the overall vacancy rate declined considerably from 1985 to 1987, despite the addition of 40,000 sq. ft. in the new York Centre building, renovations to 44 Hughson Street South, and expansion of the new Sun Life Building. An approximate 22 month supply of space exists in this rent range.

Buildings Up To $10 Net Per Square Foot

Twenty-four buildings are centred on Main Street at James Street and along James Street, south of the T.H. & B. Railway. These buildings are generally older and have fewer amenities than those in the more expensive categories. However, there are a few relatively new buildings located on the fringes of the Central Area.

No additional space was added from 1985 to 1987. Vacancy rates increased considerably in this time period. The lack of absorption of space and relatively high vacancy rates suggest that many years of supply of space exist in this rent range.

1.2 Outside Central Area

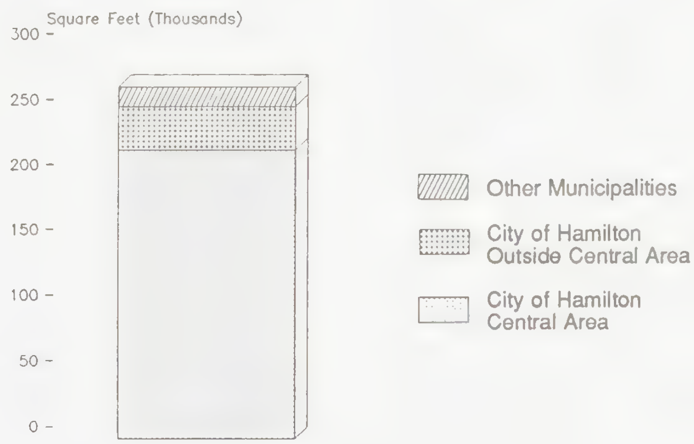
Fifteen buildings outside the Central Area account for 13% of private competitive space in Hamilton-Wentworth. Thirteen buildings are located elsewhere in the City of Hamilton, one is located in Flamborough, and one in Stoney Creek. Rents ranged between $5 and $13 net per sq. ft. in 1987.

Downtown Office Space Major Canadian Cities (1987)

City	Overall Vacancy (%)	Average Net Rent Prime Buildings ($/sq. ft.)
Hamilton[1]	**17.6**	**16.04**
Toronto	8.5	32.00
Montreal	11.5	19.00
Ottawa	9.0	21.00
Halifax - Dartmouth	17.5	18.25
Winnipeg	5.0	11.00
Regina	12.2	15.00
Calgary	16.0	18.00
Edmonton	17.0	12.00
Vancouver	17.0	20.00
Average	**13.1**	**18.23**

Sources: [1] Hamilton-Wentworth Planning and Development Department Survey
Other cities: Canadian Real Estate 1987 - Royal LePage (forecast)

Private Competitive Large Office Additions Hamilton-Wentworth (1985 to 1987)



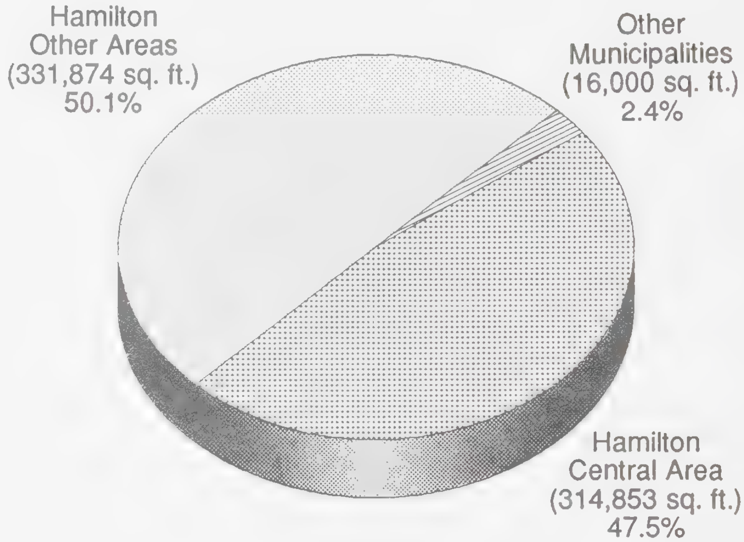
The overall vacancy rate declined slightly from 1985 to 1987, despite the addition of 46,500 sq. ft. with the completion of the Victoria Medical Centre and the Stoney Creek Professional Building.

An overall lack of absorption in this grouping between 1985 and 1987, in conjunction with relatively high amounts of vacant space, suggest many years of supply in existing buildings.

2.0 Private Non-Competitive Office Space

There are l6 large "private non-competitive" office buildings in Hamilton-Wentworth. Six buildings are located in the Central Area of the City of Hamilton, nine elsewhere in Hamilton, and one in Stoney Creek. Examples include professional offices, service organization headquarters, television/ radio stations, and industrial administrative buildings (eg. Dofasco and Chipman Chemical). These buildings total 662,727 sq. ft. - l4% of all large office space in the Region. No new space of over l0,000 sq. ft. was constructed from l985 to l987 in this category.

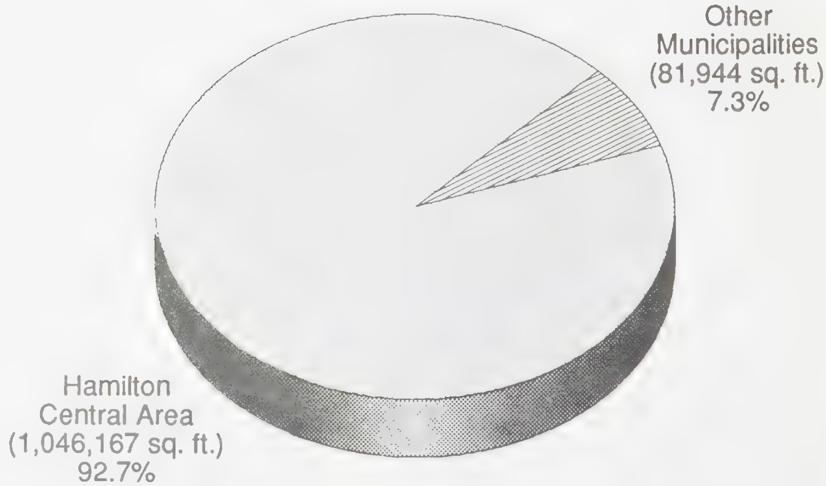
Private Non-Competitive Office Space - 1987 (buildings with over 10,000 sq. ft.)



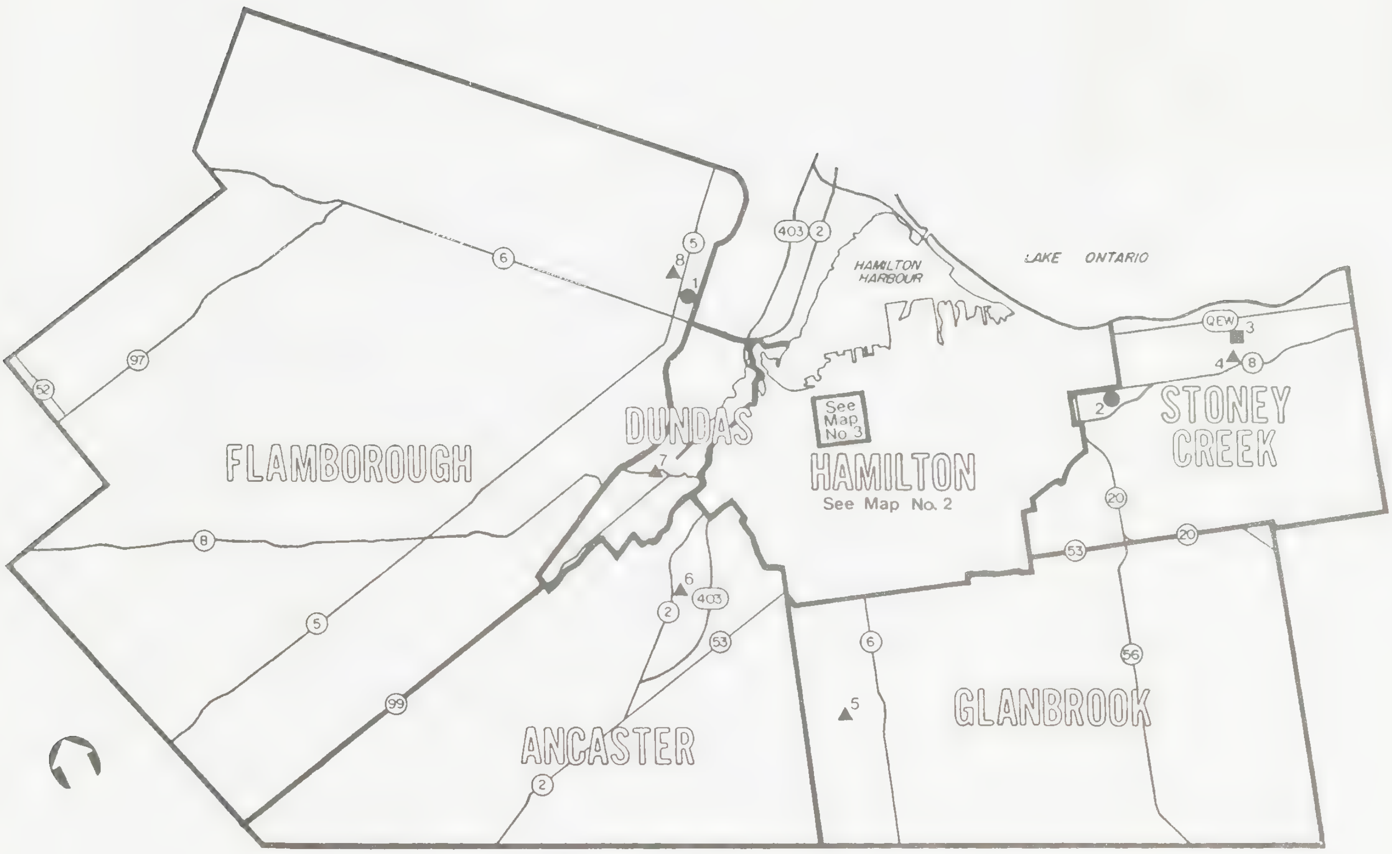
3.0 Public Office Space

There are l7 large "public" office buildings in Hamilton-Wentworth. Examples include the downtown Ellen Fairclough Building (housing Provincial and Regional Departments), area municipality City Halls, and public agency buildings. Twelve buildings are located in the Central Area of the City of Hamilton and five are located in other area municipalities. These buildings total l,l28,lll sq. ft. - 24% of all large office space in Hamilton-Wentworth. No new space of over l0,000 sq. ft. was constructed from l985 to l987 in this category.

Public Office Space - 1987 (buildings with over 10,000 sq. ft.)



Large Office Buildings
Hamilton-Wentworth Region
Map No. 1



● Private Competitive Buildings

1.	Flamborough Professional Building	50 Dundas Street East	14,600 sq. ft.
2.	Stoney Creek Professional Arts Building	980 Queenston Road	14,500 sq. ft.

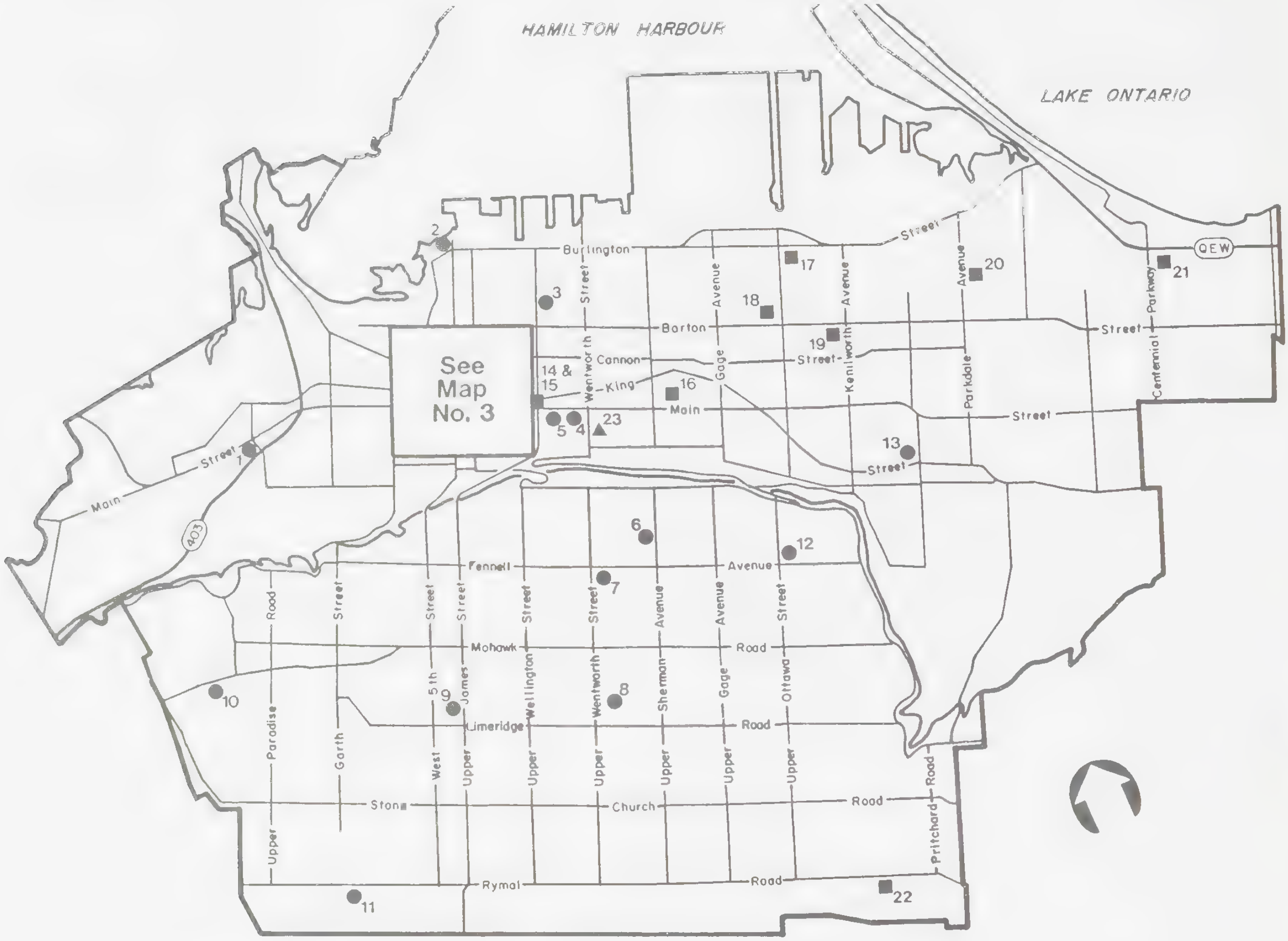
■ Private Non-Competitive Buildings

3.	Chipman Chemical Building	400 Jones Road	16,000 sq. ft.

▲ Public Buildings

4.	Stoney Creek City Hall	775 Highway No. 8	13,335 sq. ft.
5.	Hamilton Civic Airport Terminal	Airport Road, Mount Hope	33,212 sq. ft.
6.	Ancaster Town Hall	300 Wilson Street East	11,622 sq. ft.
7.	Dundas Town Hall	60 Main Street East	10,287 sq. ft.
8.	Flamborough Township Offices	163 Highway No. 5 East	13,488 sq. ft.

Large Office Buildings
City of Hamilton - Outside Central Area
Map No. 2



● Private Competitive Buildings

1.	Mainwood Plaza	875 Main Street West	32,000 sq. ft.
2.	Hamilton Harbour Commissioners	605 James Street North	31,362 sq. ft.
3.	Victoria Medical Centre	316 Victoria Avenue North	32,000 sq. ft.
4.	Economical Mutual Life	460 Main Street East	22,924 sq. ft.
5.	Emmy Schoene Building	370 Main Street East	28,841 sq. ft.
6.	Avestel Credit Union	688 Queensdale Avenue East	21,433 sq. ft.
7.	Fenworth Plaza	530 Fennell Avenue East	17,190 sq. ft.
8.	Limeridge Mall	883 Upper Wentworth Street	56,031 sq. ft.
9.	Mount James Square	1030 Upper James Street	26,021 sq. ft.
10.	Harvard Square	801 Mohawk Road West	15,795 sq. ft.
11.	Canada Plan Building	393 Rymal Road West	30,000 sq. ft.
12.	Hamilton Gardens	1119 Fennell Avenue East	13,000 sq. ft.
13.	1955 King East	1955 King Street East	13,500 sq. ft.

■ Private Non-Competitive Buildings

14.	Canadian Red Cross Society	299 Main Street East	18,432 sq. ft.
15.	Canadian Red Cross Society	400 King Street East	10,467 sq. ft.
16.	CKOC Radio	73 Garfield Avenue South	11,631 sq. ft.
17.	Dofasco Building	1330 Burlington Street East	219,431 sq. ft.
18.	United Steel Workers Centre	1035 Barton Street East	13,146 sq. ft.
19.	Hamilton-Wentworth Credit Union	1320 Barton Street East	11,949 sq. ft.
20.	Teamsters Local 179	514 Parkdale Avenue North	22,334 sq. ft.
21.	Waxman and Sons Limited	500 Centennial Parkway North	12,684 sq. ft.
22.	C.C. Parker Consultants	1400 Rymal Road East	11,800 sq. ft.

▲ Public Buildings

23.	Hamilton-Wentworth Childrens Aid	143 Wentworth Street South	37,444 sq. ft.

Large Office Buildings
City of Hamilton - Central Area
Map No. 3

● Private Competitive Buildings

1.	York Centre	14,000 sq. ft.
2.	11 Rebecca	38,841 sq. ft.
3.	Lister Block	24,000 sq. ft.
4.	Standard Life	409,500 sq. ft.
5.	Robert Thomson	117,000 sq. ft.
6.	Stelco Tower	337,500 sq. ft.
7.	Bank of Montreal	29,500 sq. ft.
8.	Park Place	54,560 sq. ft.
9.	Commerce Place I	183,648 sq. ft.
10.	First City Trust	79,500 sq. ft.
11.	Norwich Union	79,000 sq. ft.
12.	Royal Connaught	29,000 sq. ft.
13.	Royal Bank	53,400 sq. ft.
14.	Canada Trust	20,859 sq. ft.
15.	47 James South	12,248 sq. ft.
16.	National Trust	22,000 sq. ft.
17.	Union Gas	75,000 sq. ft.
18.	Imperial Building	26,000 sq. ft.
19.	Terminal Towers	100,000 sq. ft.
20.	40 Wellington North	28,500 sq. ft.
21.	15 Wellington North	21,000 sq. ft.
22.	First Place	72,140 sq. ft.
23.	Century 21	104,000 sq. ft.
24.	Exchange Building	25,000 sq. ft.
25.	IBM / 25 Main West	132,597 sq. ft.
26.	Civic Centre	25,890 sq. ft.
27.	46 Jackson	11,558 sq. ft.
28.	Teacher's Credit Union	11,200 sq. ft.
29.	44 Hughson	11,000 sq. ft.
30.	Unified Family Court	25,008 sq. ft.
31.	Cooper Building	17,349 sq. ft.
32.	Alexandra Square	72,559 sq. ft.
33.	Undermount Building	45,378 sq. ft.
34.	Professional Arts	45,338 sq. ft.
35.	Medical Arts	43,355 sq. ft.
36.	Duke Centre	32,000 sq. ft.
37.	New Sun Life	35,000 sq. ft.
38.	Charlton Centre	50,000 sq. ft.
39.	Main Hess Mall	16,919 sq. ft.

■ Private Non-Competitive Buildings

40.	CHCH TV	11,889 sq. ft.
41.	Bell Canada	128,880 sq. ft.
42.	Bell Canada	103,695 sq. ft.
43.	Garwood - Jones Architect	16,330 sq. ft.
44.	Society of Management Accountants	32,280 sq. ft.
45.	Canada Trust (new)	21,779 sq. ft.

▲ Public Buildings

46.	Ellen Fairclough Building	233,910 sq. ft.
47.	Hamilton Board of Education	65,636 sq. ft.
48.	Federal Government Building	179,725 sq.ft.
49.	Hamilton City Hall	101,545 sq. ft.
50.	Hamilton-Wentworth Health Dept.	25,407 sq. ft.
51.	Hamilton-Wentworth Court House	85,498 sq. ft.
52.	Hamilton Main Post Office	99,182 sq. ft.
53.	Provincial Court House	27,593 sq. ft.
54.	Hamilton-Wentworth Police Dept.	96,072 sq. ft.
55.	Hamilton Hydro-Electric Company	76,806 sq. ft.
56.	Hamilton Wentworth Roman Catholic Separate School Board	17,349 sq. ft.

This is one in a series of information bulletins produced by the Regional Planning Branch of the Planning and Development Department, Regional Municipality of Hamilton-Wentworth.

Other bulletins currently available:

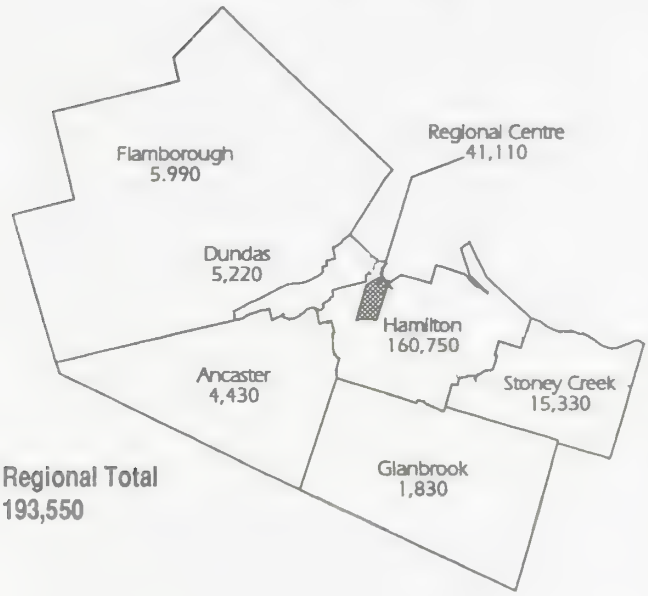
- Greater Hamilton Population Trends (Report 87-1)
- Greater Hamilton Labour Force (Report 87-2)
- Greater Hamilton Construction Trends (Report 87-3)
- Greater Hamilton Industrial Development (Report 87-4)

For further information, please contact Chris Walker at 526-4219

Greater Hamilton
Employment Trends
Bulletin, July 1991

Hamilton - Wentworth Region • Planning and Development Department • Strategic Planning Division

Employment Totals, 1990
Hamilton-Wentworth



Regional Total
193,550

Introduction

In the summer and fall of 1990 the Planning and Development Department conducted a survey of the employed labour force in the Region. This is part of an ongoing project for monitoring the basic characteristics of the employed labour force. A survey of the entire Region was first conducted in 1982 and a survey of only the Regional Centre was conducted in 1989. The 1990 survey is the second complete survey of the entire Region. An overview of the methods used in the survey and potential error in data collection is provided in ***Appendix A***

This bulletin highlights the changes that occurred between 1982 and 1990 in the characteristics of the employed labour force in the Region and the one year changes that occured in the Regional Centre.

Funding for the 1990 survey was provided by Employment and Immigration Canada through the Canadian Jobs Strategy.

Highlights

Regional Municipality

- *total Regional employment increased by approximately 16,875 individuals between 1982 and 1990 representing a 10% increase.*
- *office employment increased by 9,215 positions since 1982 and now comprises 23% of total Regional employment.*
- *retail employment increased by 13,035 positions, and now represents 28% of total Regional employment.*

Regional Centre

- *between 1982 and 1990 employment in manufacturing declined by 9,640 workers, dropping from 33% in 1982 to 25% in 1990.*
- *approximately 41,110 individuals are employed by some 2,460 business sites in the Regional Centre. This is a decrease of about 900 employees and 100 business sites from 1989.*
- *office activities accounted for 48% of total employment in the Regional Centre while retail activity comprised 20%, institutions 20% and manufacturing 5%.*
- *in 1990, institutions became the second largest employer with approximately 8,575 individuals.*
- *manufacturing employment significantly decreased from 8% of total employment in the Regional Centre to 5%.*
- *small businesses ranging in size from 1 to 20 individuals employed 11,410 people in the Regional Centre.*
- *the workforce in the Regional Centre is 41% male and 59% female.*

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Bulletin, July 1991

Hamilton - Wentworth Region • Planning and Development Department • Strategic Planning Division

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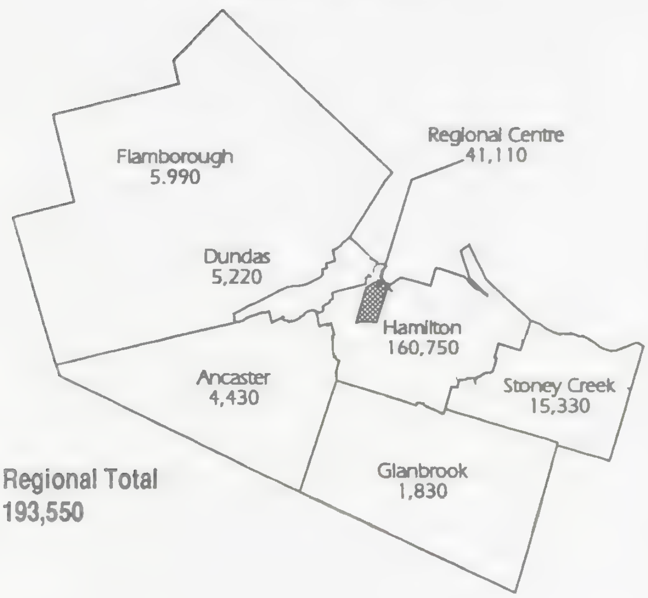

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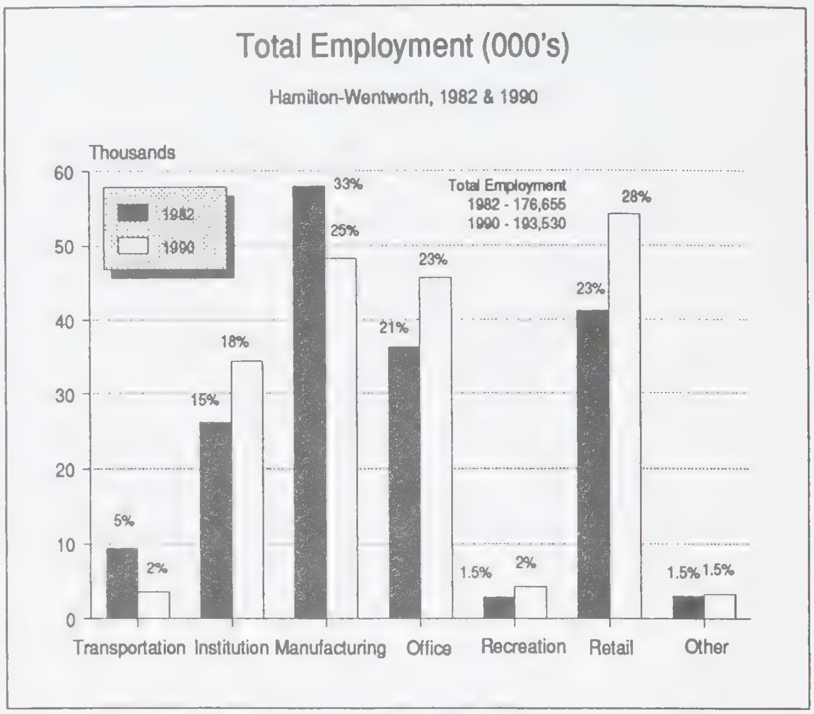
- *the workforce in the Regional Centre is 41% male and 59% female.*

Regional Employment



Employment Characteristics of the Regional Municipality of Hamilton-Wentworth

Total employment in Hamilton-Wentworth increased by almost 16,880 workers from 176,655 in 1982 to 193,530 in 1990. In addition, almost 1,200 new business sites opened in the same eight year period. Reflecting national trends the largest increases in employment are in office and retail jobs while the number of manufacturing jobs are dropping.

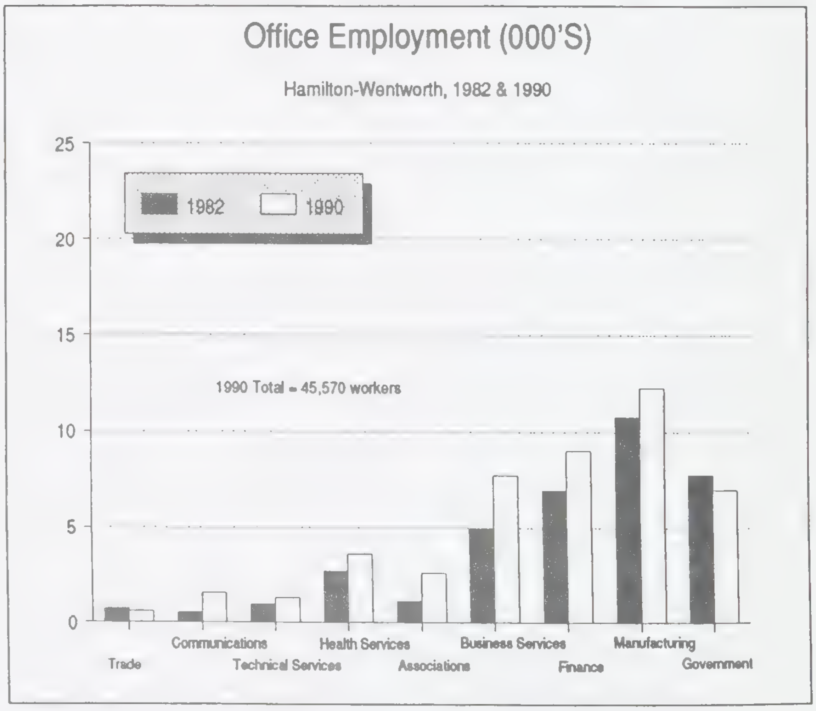
All municipalities saw an increase in total employment between 1982 and 1990.

Office Employment

Total office employment increased by 25% from 36,355 in 1982 to 45,570 in 1990. Office employment increased in every municipality and with the exception of Glanbrook the office sector constitutes 20% to 25% of each municipality's employment opportunities.

The largest growth in the office sector is occurring in associations (includes groups such as business associations, labour associations, and religious organizations). The number of office workers employed in this sector increased 130% to an estimated 2,575 people. With the exception of trade and government all sectors of office employment increased between 1982 and 1990. The decline in the number of government office workers is opposite to the increase experienced in the Regional Centre. Government offices would appear to be becoming more centralized in the Regional Centre.

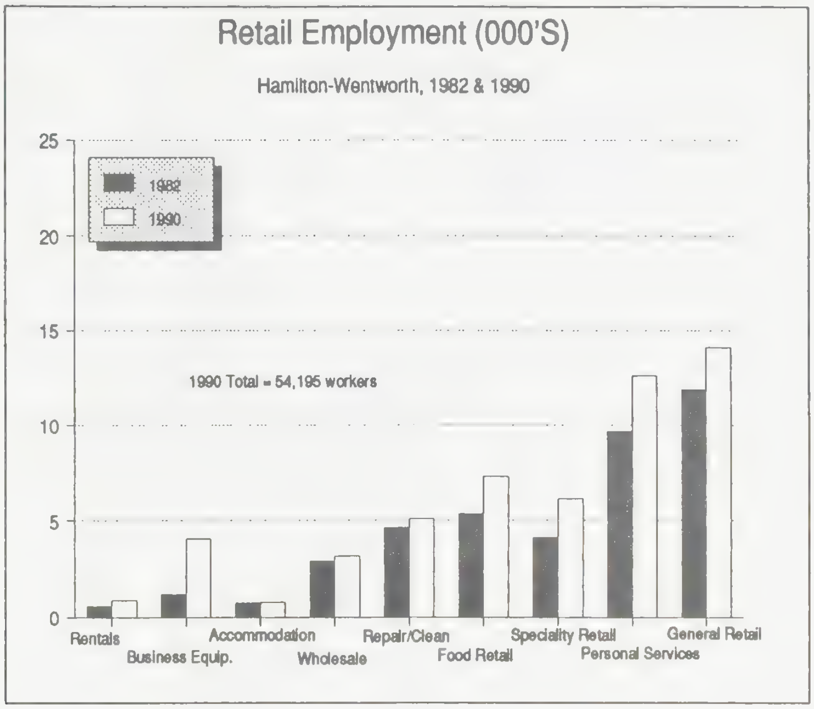
Office employees working for manufacturing businesses are the largest proportion (27%) of the 45,570 office workers in the Region. Finance with 8,990 office workers and business services with 7,710 workers are the second (20%) and third (17%) largest office employment opportunities.



ERRATA

In the "Highlights" section on the cover page under "Regional Centre" the first sentence that reads, "between 1982 and 1990 employment in manufacturing declined by 9,640 workers, dropping from 33% in 1982 to 25% in 1990" should fall under the Regional Municipality highlights.

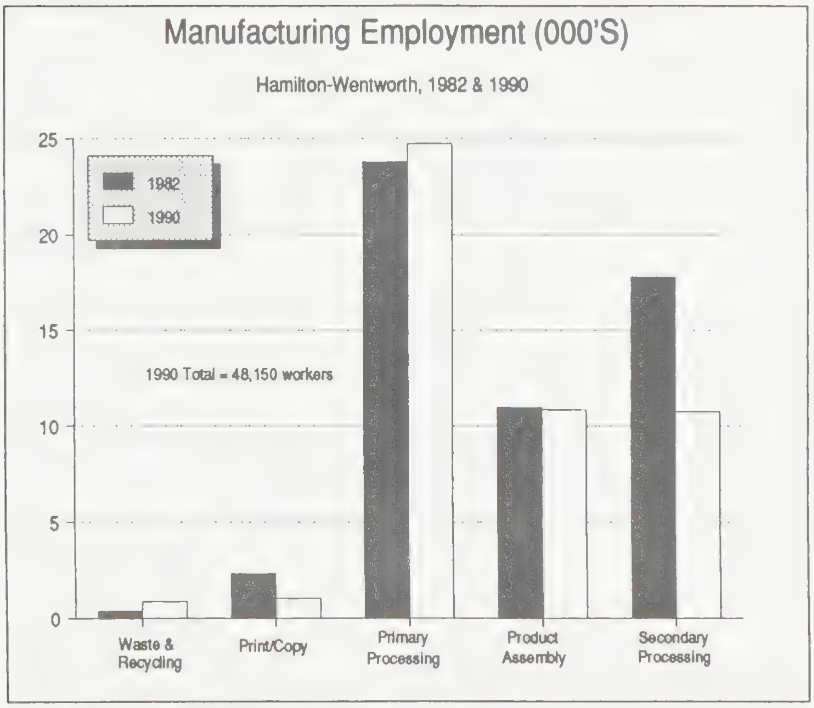
The first sentence in Manufacturing Employment on page 3 states that "...total employment in manufacturing dropped from 55,215 workers in 1982 to 48,150 workers in 1990" a difference of 7,065. This value is less than the 9,640 workers mentioned above because it excludes manufacturing employment involved in energy production, research and development and construction which explains for the difference of 2,575 employees.



Retail Employment

Retail accounts for 28% of total employment in Hamilton-Wentworth. Between 1982 and 1990 the number of people employed in retail increased by 32% from 41,155 people to 54,190 people. Retail is now the largest employment sector in the Region.

All sectors of retail increased between 1982 and 1990. The largest increase occured in business equipment which jumped 240% from 1,205 to 4,085 people. General retail and personal services however represent the largest proportion (26% and 23% respectively) of retail employment opportunities.



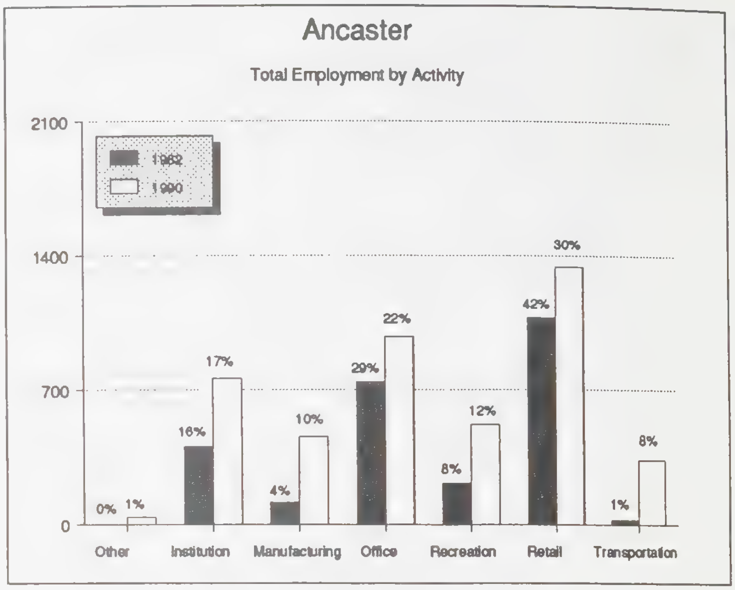
Manufacturing Employment

Reflecting national trends, total employment in manufacturing dropped from 55,215 workers in 1982 to 48,150 workers in 1990. Almost all of the decline in manufacturing employment occured in secondary processing which fell by 7,000 workers to 10,745. Primary processing remained stable at about 24,000 workers and now represents 50% of the people employed in manufacturing. In 1982, almost 1 in 3 workers in Hamilton-Wentworth were employed in manufacturing. Today that number is less than 1 in 4.

Ancaster

Ancaster's working population almost doubled between 1982 and 1990, increasing from 2,580 to 4,430 people, a 72% increase. The largest increase was in retail, increasing 1,300% and manufacturing which increased 300%.

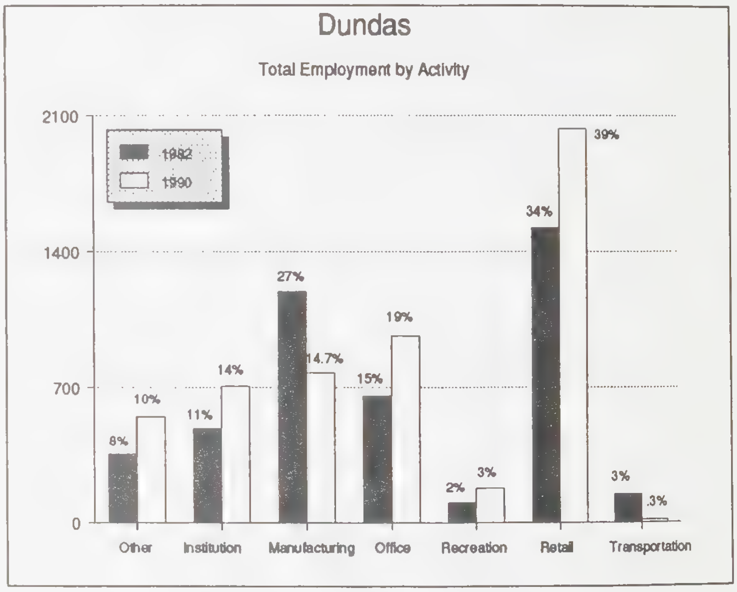
All business sizes except those employing 51 to 100 people increased in number. There are no business sites employing more than 500 people. Of the almost 380 business sites 89% employ only 1 to 20 people and employ a total of 1,800 people or 41% of the workers. Small businesses dominate the employment opportunities in Ancaster.



Dundas

Dundas experienced limited employment growth between 1982 and 1990. Total employment increased by 750 persons or 17% to 5,220 people. There was employment growth in institution, recreation and in particular retail employment opportunities while the manufacturing sector dropped from 1,200 to 775 workers.

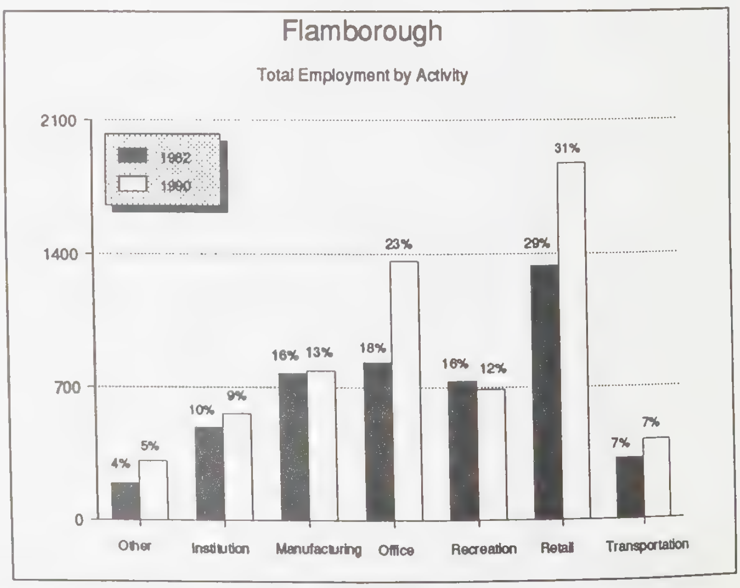
The total number of business sites increased from 435 in 1982 to 475 in 1990. Almost all growth occured in businesses employing 50 or less workers. The number of people employed by companies with 101 to 500 workers did increase by almost 50% from 810 to 1,210 people. This growth occured in the office and retail sectors.



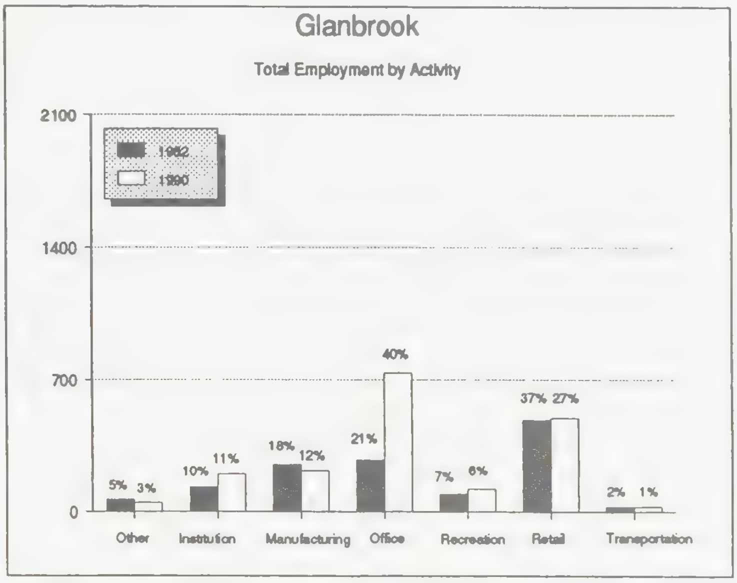
Flamborough

Total employment in Flamborough increased by 28% from 4,685 in 1982 to 5,990 in 1990. The majority of growth is occuring in the retail, transportation and office activities. The only sector to register a decline is recreation, with a drop of only 45 people.

The number of business sites employing 101 to 500 people increased from 4 in 1982 to 11 in 1990 and now employ 1,770 people or 30% of Flamborough's workers. Small businesses employing 1 to 20 people increased by 9% to 565 sites and employ 44% of the workforce. Retail and office activities dominate representing 75% of the 620 surveyed businesses in 1990.



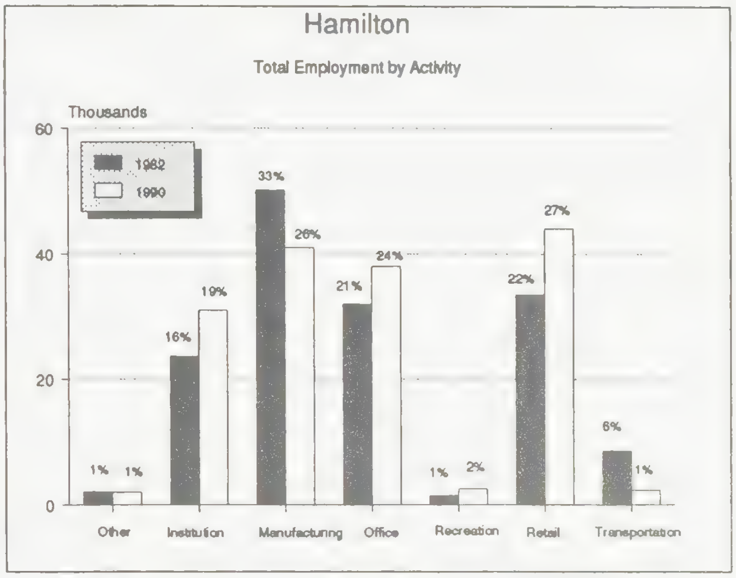
Glanbrook



Although total employment in Glanbrook grew by only 515 positions, this is a 39% increase since 1982. Almost all growth can be attributed to the office sector which increased by 167% from 275 positions in 1982 to 730 positions in 1990.

In contrast to the strong employment growth the number of business sites only increased by 17 from 220 in 1982. The number of sites employing 21 to 50 people doubled while the number employing 51 to 100 people increased from 2 to 5. Businesses employing 20 or more people employ 50% of the workers in Glanbrook.

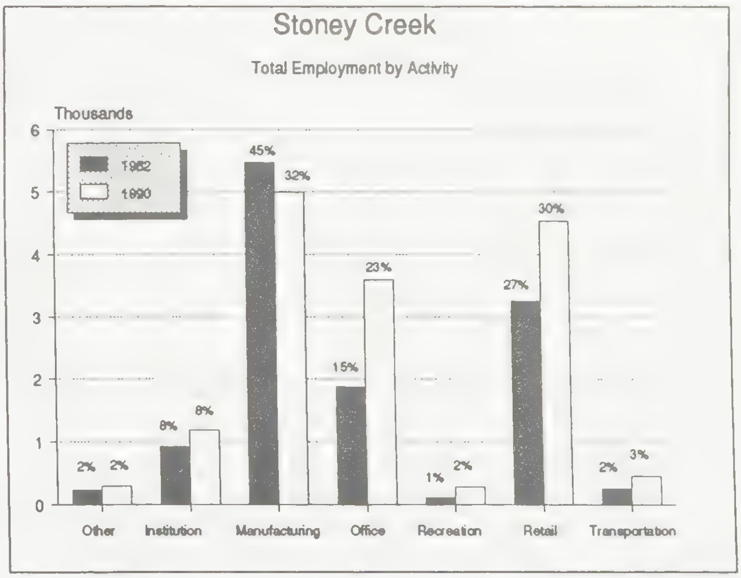
Hamilton



Total employment in Hamilton grew only 6%, but this represents an increase of 9,270 people from 151,475 in 1982 to 160,745 in 1990. The number of people employed in transport activities dropped by over 6,200 and the number in manufacturing fell be over 9,000. Employment grew in recreation by 70% (1,040 people), in retail by 31% (10,440 people), in institutions by 31% (7,245 people) and in offices by 19% (5,965 people). In 1982, manufacturing was the largest employment sector employing 1 in 3 workers in Hamilton. In 1990, retail became the largest employment sector.

Hamilton is the only municipality with business sites employing more than 1,000 people. The number of large employers dropped from 18 in 1982 to 10 in 1990. This drop occured mainly in the manufacturing and transport sectors. Large businesses however still provide 1 in 4 jobs in Hamilton. The number of businesses employing 501 to 1,000 people remained at 17 but shifted from manufacturing and transport to the office sector. All other business sizes registered an increase in number between 1982 and 1990.

Stoney Creek



Stoney Creek experienced a 26% increase in total employment from 12,125 in 1982 to 15,330 in 1990. Total employment grew fastest in recreation by 151% (170 people), in retail by 77% (1,280 people) and in the office sector by 91% (2,700 people). Manufacturing although experiencing a decline in total employment remains with 4,990 workers the largest employment sector in Stoney Creek.

In 1982, Stoney Creek had one business site employing more than 500 people. By 1990 this business site reduced employment and there are no large employment sites in Stoney Creek. There was an increase of almost 230 business sites of which 80% are small businesses employing 1 to 20 people. There is currently a total of 1,160 business sites in Stoney Creek.

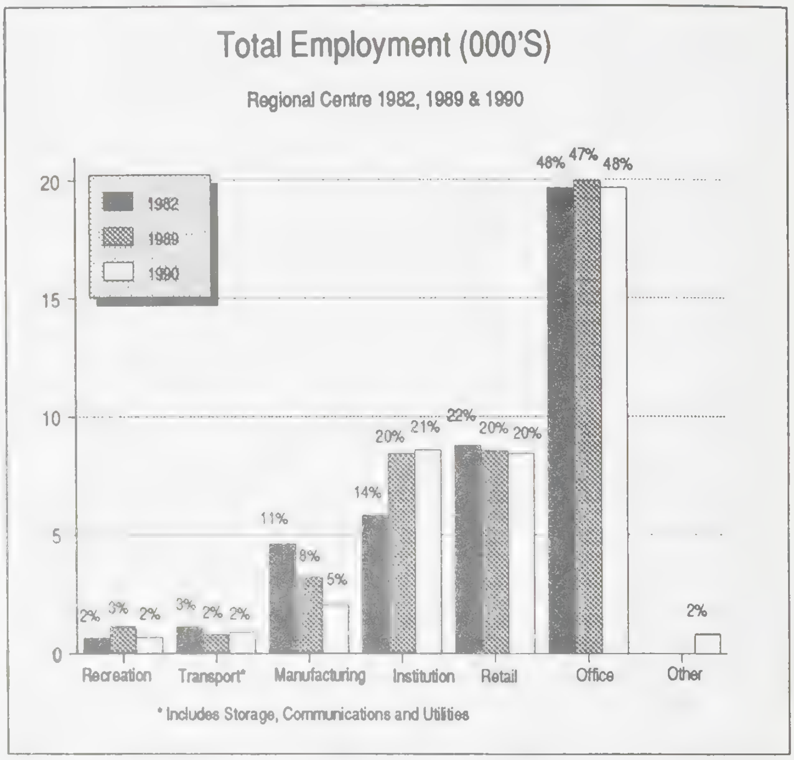
Regional Centre Employment

Total Employment in The Regional Centre

The Regional Centre encompasses 508 hectares and is bounded by the Niagara Escarpment, the Hamilton Harbour, Queen Street and Victoria Street. An estimated 41,110 individuals are employed at some 2,460 business sites in the Regional Centre. Various activities experienced a decline in employment between 1989 and 1990 and total employment in the Regional Centre decreased by 900 workers.

Manufacturing experienced the largest decrease with approximately 970 manufacturing jobs lost between 1989 and 1990. Manufacturing now only represents 5% of total employment in the Regional Centre.

Over 19,650 or 48% of Regional Centre employees work in the office sector; 40% are evenly split among retail and institution; and the remaining 12% is dispersed amongst transportation, recreation, manufacturing and other activities.

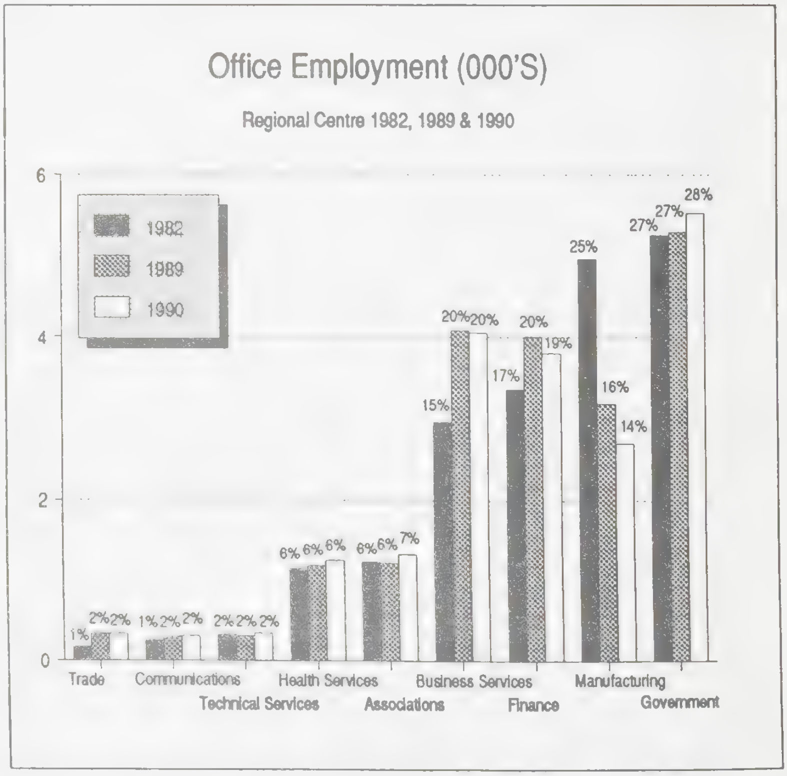


Office Employment

Business services (including lawyers, accountants and advertising agencies) continued its rapid growth. An estimated 20% of total office employment in the Regional Centre is attributed to business services. Nearly 5,520 people are employed in government offices representing the largest portion (28%) of all office employment opportunities in the Regional Centre.

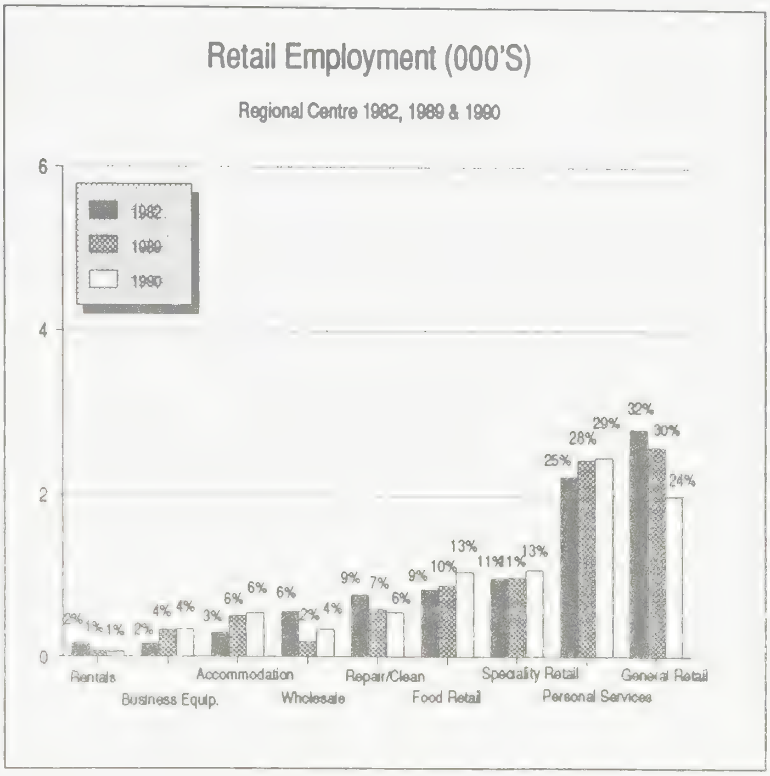
The proportion of people employed in trade, communication, technical services, health services and associations remained constant between 1989 and 1990. Office employees working for manufacturing businesses continued to decline from 3,200 in 1989 to 2,700 in 1990 and now only represent 14% of total office employment. The number of people employed by financial institutions declined in one year from 4,000 to 3,800.

The reduction of office staff in both manufacturing and financial institutions resulted in the decline of total office employment in the Regional Centre. The one year net loss in office employment is almost 290 positions.



Retail Employment

There are several retail shopping districts in the Regional Centre including: Jackson Square, Hess Village, Downtown Promenade, International Village and Jamesville.



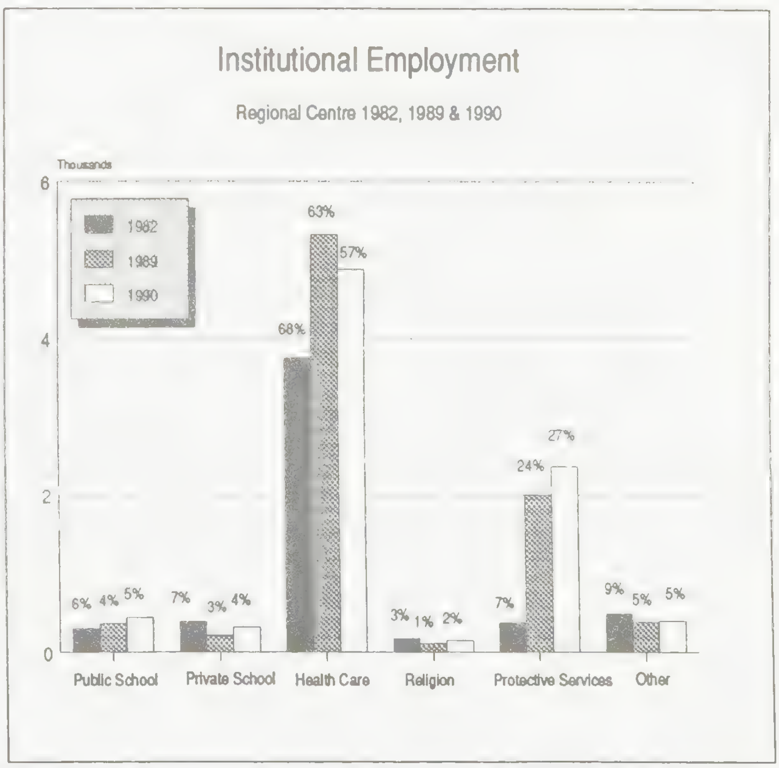
Retail accounts for 20% of total employment in the Regional Centre. The number of people employed in retail however, continues to decline due to a large loss in general retail. This retail sector decreased by 600 positions from an estimated 2,590 in 1989 to 1,990 positions in 1990.

Speciality retail increased by only 95 positions. This was not sufficient to overcome the negative effect originating from general retailing. Therefore, the shift from general to speciality retailing revealed in the period from 1982 to 1989 is not seen in 1989 to 1990. In 1989, both speciality and general retailing comprised 41% of all retail employment. This declined to 37% in 1990 with speciality retail employing over 1,070 people and general retailing employing almost 1,990 people.

The number of workers employed in food retail increased by 170 between 1989 and 1990. Rental and repair/cleaning service activities experienced a negative change in 1990. Wholesale employment, which showed a significant decline between 1982 and 1989 revealed a recovery in 1990, by increasing employment from 190 to 340 individuals.

Institutional Employment

In previous years, institutions were third in overall total employment in the Regional Centre. In 1990, with the decline in the retail sector, institutions became the second largest activity employing 8,575 individuals. This sector includes educational, health, religious, protective/custodial establishments, as well as, libraries, and legal and legislative activities.



Health services is the largest institutional employer in the Regional Centre with 57% of all institutional employment. Both St. Joseph and General Civic hospitals employ more than 2,000 individuals. Employment in this sector is stable because hospital expansions are near completion.

Protective/custodial services employ 2,365 individuals and experienced the greatest gain of workers in the institutional sector. These service activities increased by 18% from 1989 to 1990.

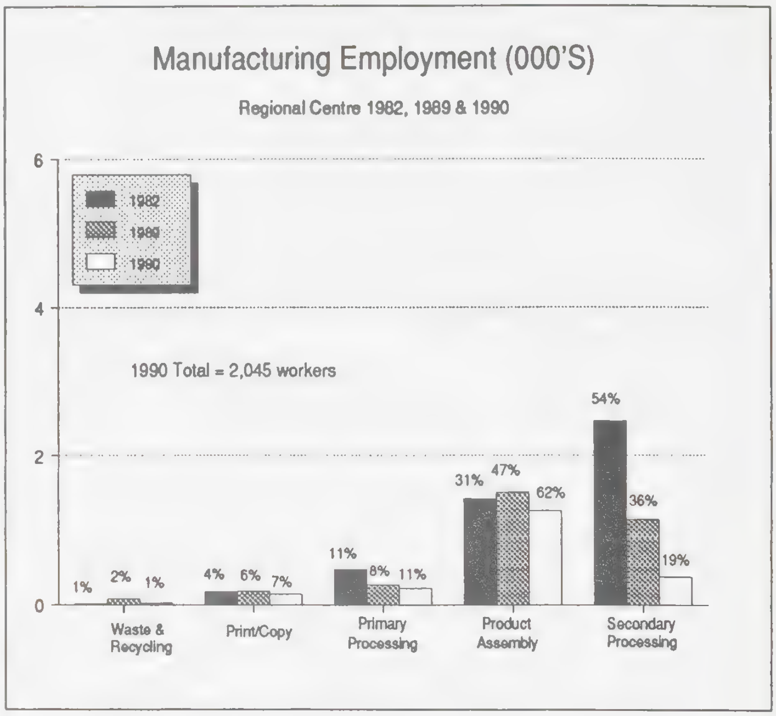
Since 1989, the education employment sector has increased by 190 positions. This was partially the result of assigning as their place of work "floating part-time staff" to the two School Board offices.

Manufacturing Employment

An estimated 5% of all employees in the Regional Centre are associated with some form of manufacturing activity. The number of people employed in manufacturing continues to decline. Between 1982 and 1989 there was a 30% drop in total manufacturing employment. Since 1989 there has been an additional 37% decrease.

The greatest change occurred in the secondary processing sector, declining from 1,160 positions in 1989 to 380 positions in 1990, a -68% change. Primary and secondary processing includes heavy manufacturing while product assembly is considered to be light manufacturing.

Employment totals in other sectors of manufacturing are remaining relatively stable. Product assembly now employs 62% of the manufacturing labour force in the Regional Centre.



Service Employment

According to the Standard Industrial Classification System, the service sector includes all employees except those employed by businesses classified agricultural, mining and manufacturing.

The service sector in the Regional Centre grew marginally by only 1% between 1989 and 1990. As a percentage of total employment, the service sector employs almost 92% of all workers.

The increase in wholesale trade, education and other services offset the decline in retail trade, and health/social services. The largest employment components in this sector are: health and social services (20%), government (17%), F.I.R.E. (12%), and retail trade (12%).

Health and social services and government are the most actively growing service components since 1982.

SERVICE SECTOR EMPLOYMENT - REGIONAL CENTRE 1982, 1989 & 1990

SERVICE SECTOR	1982	%	1989	%	1990	%
Wholesale Trade	813	2%	413	1%	696	2%
Retail Trade	5,107	15%	5,790	15%	4,454	12%
F.I.R.E.*	3,558	11%	4,481	12%	4,508	12%
Business Trade	2,626	8%	3,947	10%	3,678	10%
Government	5,045	15%	6,322	17%	6,409	17%
Education	1,103	3%	1,162	3%	1,924	5%
Health/Social Services	5,913	18%	7,904	21%	7,736	20%
Accom/Food/Beverages	2,575	8%	2,569	7%	2,665	7%
Other Services	6,363	19%	5,118	14%	5,950	16%
TOTAL	33,103	100%	37,706	100%	38,020	100%

* Fire, Insurance, Real Estate

Employment by Activity and Business Size

Businesses are grouped according to the number of workers they employ. There are six categories: 1-20 employees per business site, 21-50, 51-100, 101-500, 501-1,000 and businesses employing more than 1,000 people.

The number of employees in the Regional Centre employed by companies with 500 or more employees decreased between 1989 and 1990 while the number working for companies with 50 or less increased. The drop in the number of people working in large companies is occurring mainly in the office and retail sector.

Small businesses defined as employing from 1-20 people have the largest number of employees. Businesses with 6 or less employees employ 28% of all workers in the Regional Centre. Employment growth in small businesses is occurring mainly in the retail and office sector.

1982 # of Employees

BUSINESS ACTIVITY	1-20	21-50	51-100	101-500	501-1000	1001+	Total
Institution	492	465	361	829	0	3,652	5,799
Manufacturing	479	266	725	1,874	1,250	0	4,594
Offices	4,968	2,663	2,875	6,371	1,244	15,460	19,667
Recreation	202	105	171	190	0	0	668
Retail	4,947	1,494	926	1,426	0	0	8,793
Transport	273	251	165	446	0	0	1,135
Total	11,361	5,244	5,223	11,136	2,494	5,198	40,656

1989 # of Employees

BUSINESS ACTIVITY	1-20	21-50	51-100	101-500	501-1000	1001+	Total
Institution	455	375	138	1,338	1,252	4,849	8,404
Manufacturing	423	252	592	1,332	624	0	3,223
Offices	5,076	3,404	1,778	5,334	4,350	0	19,942
Recreation	174	137	280	550	0	0	1,141
Retail	4,820	1,383	854	961	547	0	8,565
Transport	263	64	91	380	0	0	798
Total	11,211	5,615	3,733	9,895	6,773	4,846	42,073

1990 # of Employees

BUSINESS ACTIVITY	1-20	21-50	51-100	101-500	501-1000	1001+	Total
Institution	406	368	206	1,289	1,548	4,757	8,574
Manufacturing	408	237	349	376	676	0	2,046
Offices	5,114	3,571	1,468	5,720	3,782	0	19,655
Recreation	137	184	76	303	0	0	700
Retail	5,114	1,306	785	1,212	0	0	8,417
Transport	217	0	142	538	0	0	897
Other	13	68	0	742	0	0	823
Total	11,409	5,734	3,026	10,180	6,006	4,757	41,112

Demographic Profile

One trend apparent in both male and female employment profiles is the proportional stability in the various activity sectors.

Since a large percentage of the manufacturing workforce is derived from the male population, any change in this workforce will influence the male employment profile. The greatest fluctuation in the male employment profile occurred in manufacturing, a significant decline from 11% in 1982 to 6% in 1990.

The proportion of males in institutional establishments increased by 3% since 1989. As for transport, retail, recreation and office, the male percentage composition paralleled that of 1989. Therefore, the decline in the Regional Centre in male employment from 17,635 to approximately 16,930 is largely the result of losses in manufacturing employment.

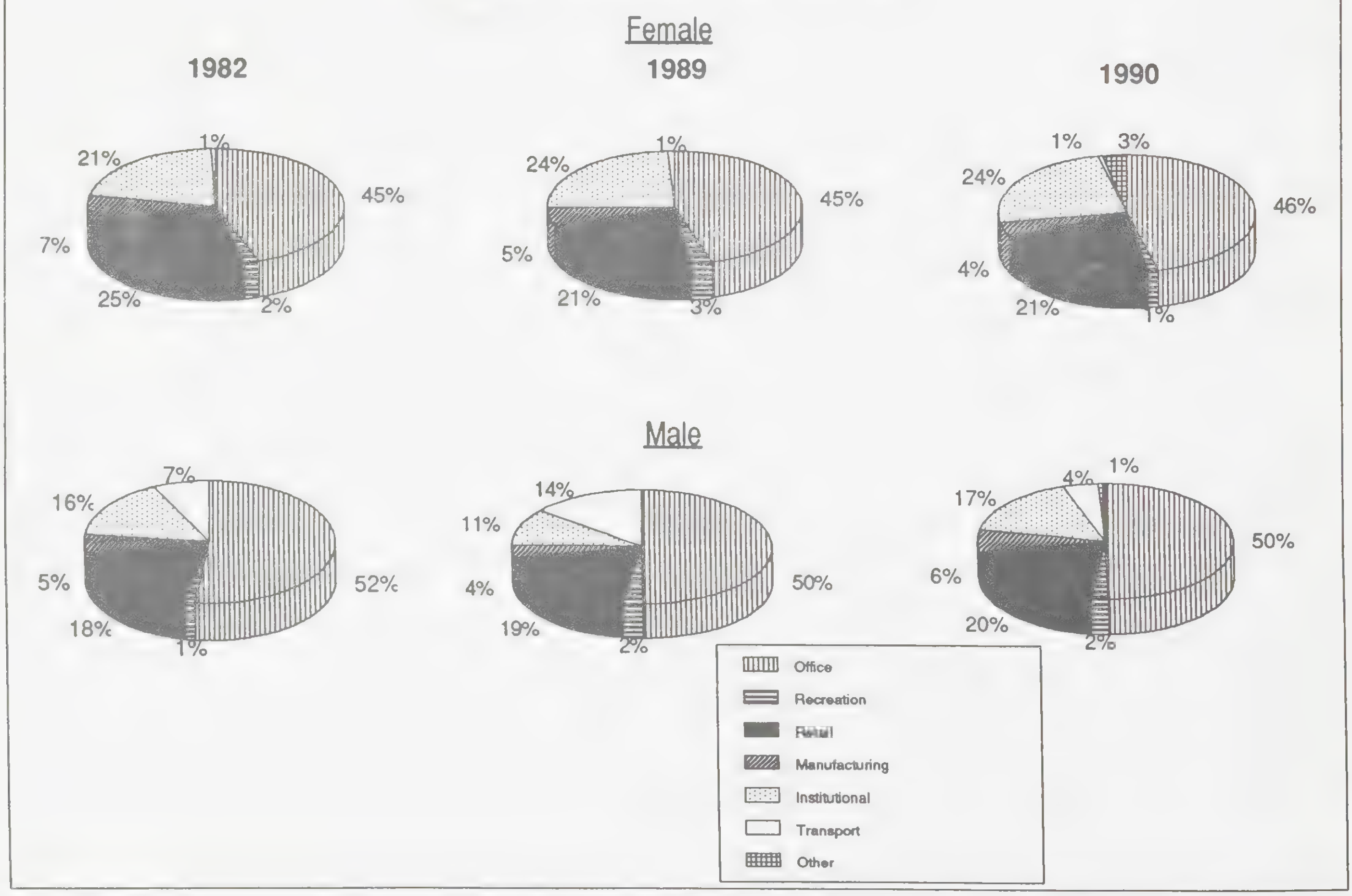
Male employees in the Regional Centre comprise 41% of total employment. 34% are full-time, 6% are part-time and 1% are seasonal. Male part-time employment accounts for 15% of all male workers and 29% of all part-time employment, a decrease from 30% in 1989.

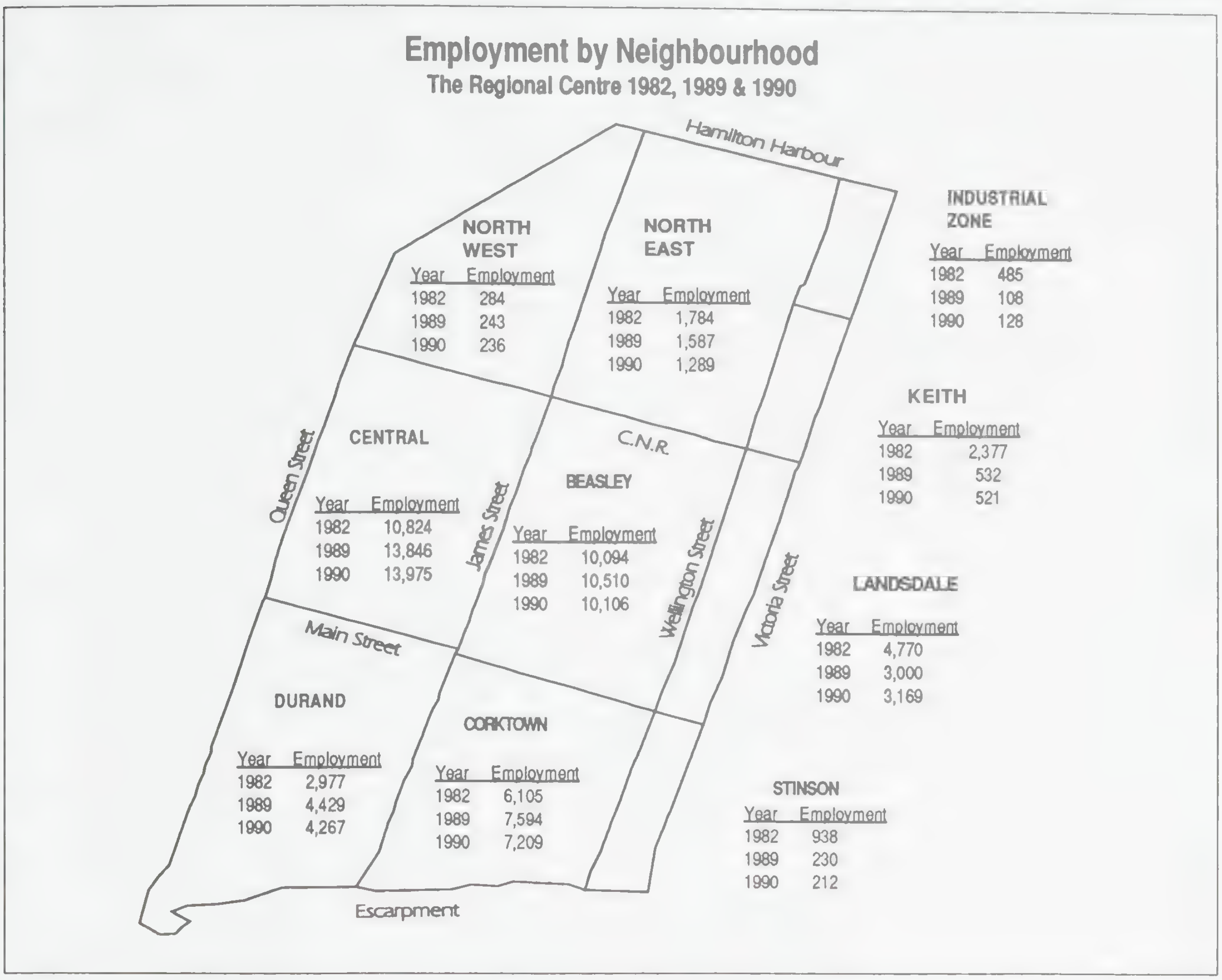
The distribution of female employment did not change as dramatically as those of their male counterparts. Female participation increased in the office sector by 2%. Manufacturing and institutions both dropped by a percentage point and recreation dropped 2% from 3% in 1989.

Females constitute 59% of the Regional Centre's total workforce. Approximately 42% of all females work on a full time basis, 15% work on a part-time basis and about 1% work on a seasonal basis. Part-time employment accounts for 26% of all female workers and 71% of all part-time employment, an increase from 70% in 1989.

There is a greater concentration of female employees in institutionalized positions. In the recreation, retail and transport activities, both male and female proportions are comparable. Office industry contains the largest percentage of both male and female employment with 20% and 27% respectively.

Employment Characteristics by Sex
Regional Centre, 1982, 1989 and 1990





Employment by Neighbourhood

The Regional Centre consists of six neighbourhoods and parts of four adjacent neighbourhoods.

With the exception of Central and Landsdale neighbourhoods every neighbourhood in the Regional Centre experienced a decline in total employment between 1989 and 1990. The greatest declines occured in Beasley (400 people), Corktown (400 people), North East (300 people) and Durand (150 people).

Combined the neighbourhoods of Central, Beasley and Corktown have a total employment of over 30,000 people, representing 74% of the Regional Centre active workers. The high concentration of employment opportunities in these neighbourhoods reflects the location of retail stores, medical facilities and office buildings. Neighbourhoods in the north end of the Regional Centre are seeing a decline in employment because the majority of jobs are in manufacturing. Many manufacturing sites have closed in the 1980s in this area. Retail and office employment opportunities are increasing and these will be increasingly concentrated in the core of the Regional Centre.

APPENDIX A

The 1990 Employment Survey was conducted between the months of May and December of 1990 and interviewed all business establishments in the Regional Municipality of Hamilton-Wentworth. Follow-ups were concluded in January 1991 and an additional two months were spent verifying the data.

The following conditions and/or assumptions apply:

- tables and charts are generated only from surveys with either accurate or estimated data;
- both the 1982 and 1990 Employment Surveys were conducted during recession periods;
- not all totals equal their parts since several businesses were unable to determine employment breakdown. For these instances, only total employment figures were recorded;
- due to the magnitude and duration of the survey, the existence of business relocation is inevitable and can create problems in terms of data duplication or lack of, if overlooked;
- the categorization of businesses using the Standard Industrial Classification (SIC) and Regional Information System Classification (RISC) codes may vary from previous surveys due to interpretational differences; codes were especially difficult to assign to businesses involved with a 50/50 activity split, eg. wholesale/retail;
- for corporations or companies with more than one physical location, employment totals are dispersed accordingly;
- over 32,000 records retrieved from the assessment database were identified as properties with employment potential; at the completion of the survey it was estimated that:

Description	Records	Percentage
Refusals/Difficult to contact	45	0.1%
Farmlands	3,829	11.9%
Accurate Surveys	11,236	34.8%
Estimated Surveys	334	1.0%
Residential	2,528	7.8%
Vacant	2,411	7.5%
Developable properties	1,842	5.7%
Grasslands	646	2.0%
Not needed	9,415	29.2%
Total	32,286	100%

- the small percentage of refusals pertain to small businesses and thus do not have a significant impact on the overall findings of the survey;
- approximately 8% of those surveyed were once businesses functioning from residential units;
- farmlands were considered as self employed entities and thus excluded form the survey (an agricultural survey exists);
- self-employed individuals were difficult to track;
- the survey does not distinguish individuals with more than one position of employment; and
- roughly 8% of buildings with commercial/industrial potential were vacant.

This is one of a series of information bulletins produced by the Strategic Planning Division of the Planning and Development Department, Regional Municipality of Hamilton-Wentworth.

For further information please contact:

The Planning and Development Department
119 King Street West, 14th Floor
Hamilton, Ontario

(416) 546-4186 Fax (416) 546-4364

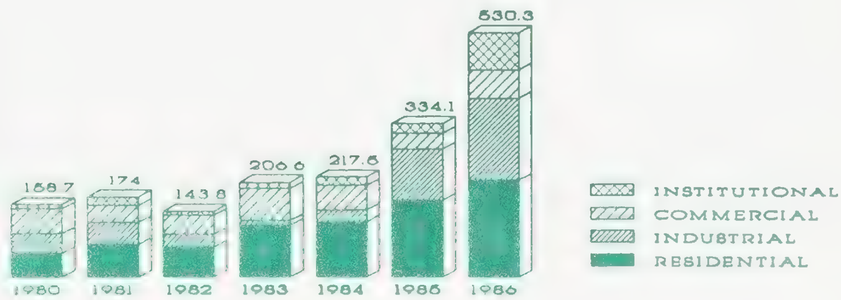
GREATER HAMILTON CONSTRUCTION TRENDS
DEVELOPMENT - REPORT 87-3

Hamilton-Wentworth Region   Planning and Development Department   Strategic Planning Division

INTRODUCTION

This bulletin describes construction activity in the Regional Municipality of Hamilton-Wentworth from January 1980 to September 1987 and compares 1980 to 1986 activity to that of other municipalities in Ontario and across Canada.
Sources: StatisticsCanada 1980-1986 Annual Building Permit Summaries, 1987 Area Municipality monthly Building Permit Summaries compiled by the Hamilton Wentworth Economic Development Department.

HAMILTON-WENTWORTH 1980-1986
TOTAL BUILDING PERMITS ($MILLIONS)



HIGHLIGHTS

RECORD TOTAL ACTIVITY IN 1986
- Half a billion dollars in building permits were issued in Hamilton-Wentworth in 1986 - a 59% gain over 1985. Annual totals increased greatly from 1980 to 1986.
- Growth in activity kept pace with nearby urban areas from 1980 to 1984 and surpassed them in 1985 and 1986.
- $418.8 million in permits for the first 9 months of 1987 suggests continuing high activity.

RESIDENTIAL BUILDINGS DOMINATES
- Growth surpassed other sectors as high demand continued for low-density housing in southern Ontario.
- 1986 value of $210.4 million was four times that of 1980.
- 68% of the 13,000 units built from 1980 to 1986 were single family homes.
- Recent growth has surpassed most other urban areas in Canada.
- $260.2 million in permits for the first three quarters of 1987 suggests continuing strong growth.

RECENT BOOM IN INDUSTRIAL CONSTRUCTION
- Values greatly increased in 1985 and 1986 following weak activity from 1980 to 1984.
- 1986 value of $179.6 million was four times that of 1980.
- Growth considerably outpaced all other urban areas in Ontario and Canada.
- $ 60.4 million in permits for the first 9 months of 1987 suggests a return to more moderate growth.

FLUCTUATING COMMERCIAL CONSTRUCTION
- Values rebounded in 1986 to $60.1 million, an increase of 25 % over the average annual values from 1980 to 1985.
- Growth was slower than other urban areas in Ontario and Canada.
- $60.7 million in permits in the first three quarters of 1987 suggests continuing strong activity.

1986 GROWTH IN INSTITUTIONAL CONSTRUCTION
- After steady growth from 1982 to 1985, activity increased in 1986 to $80.7 million.
- 1986 value was nearly four times that of 1985.
- Growth from 1980 to 1985 was in line with other southern Ontario municipalities, but the gain in 1986 was far ahead of other urban areas.
- $37.4 million in permits for the first 9 months of 1987 suggests a return to more moderate growth.

HIGH RESIDENTIAL GROWTH

RESIDENTIAL BUILDING PERMITS ($MILLIONS) - AREA MUNICIPALITIES	1980	1981	1982	1983	1984	1985	1986	Jan-Sept 1987
Ancaster	8.7	10.4	8.1	19.6	21.7	26.3	42.5	42.4
Dundas	0.8	5.0	3.2	5.7	4.6	10.4	8.2	29.7
Flamborough	5.6	8.6	6.4	12.9	14.7	20.0	24.6	23.6
Glanbrook	1.7	1.5	1.4	2.7	1.9	2.8	3.9	4.0
Hamilton	21.4	24.1	32.0	41.8	46.0	67.7	85.7	118.7
Stoney Creek	13.9	21.9	13.5	30.0	30.9	40.8	45.5	41.7

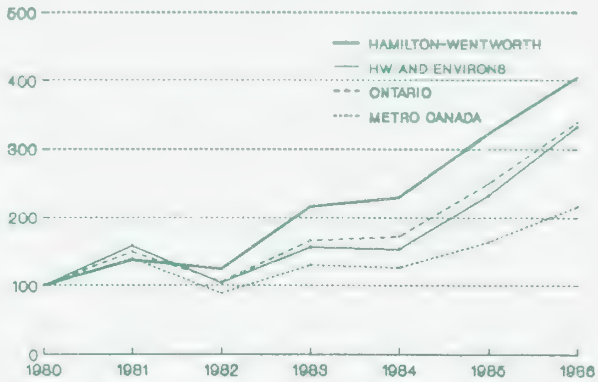
Hamilton-Wentworth enjoyed significant growth in residential construction from 1980 to 1986. Nearly $800 million in permits were issued from 1980 to 1986. In 1986, $210.4 million in building permits were issued - a 304% improvement over 1980 and a 59% improvement over 1985. This trend is continuing with $260.2 million in permits being issued in the first 9 months of 1987 - 124% of the total for all of 1986.

The share of activity in each area municipality fluctuated from 1980 to 1986. Hamilton accounted for 39.9%, Stoney Creek 24.6%, Ancaster 17.2%, Flamborough 11.6%, Dundas 4.7% and Glanbrook 2%.

The rate of growth since 1981 outpaced that of combined urban areas near Hamilton - Wentworth ('H-W and Environs' in Table and Graph), Ontario, and metropolitan areas across Canada ('Metro Canada' in Table and Graph). However, the Region's growth was slower than that in the Metropolitan Toronto area.

Note:'H-W and Environs' includes urban areas near Hamilton - Wentworth as listed in the Table, 'Ontario' includes all Ontario municipalities,'Metro Canada' includes all Census Metropolitan Areas in Canada.

RESIDENTIAL CONSTRUCTION
PERCENTAGE OF 1980 VALUE



RESIDENTIAL BUILDING PERMIT VALUES ($ MILLIONS) REGION AND OTHER AREAS	1980	1981	1982	1983	1984	1985	1986
Hamilton-Wentworth RM	52.1	71.5	64.6	112.7	119.8	168.0	210.4
Brant County	8.6	8.2	10.6	18.4	17.5	20.4	37.6
Durham RM	63.4	142.9	135.4	176.5	189.4	296.3	525.8
Haldimand-Norfolk RM	17.1	14.7	11.1	16.9	17.3	23.9	28.5
Halton RM	77.7	106.8	57.6	97.2	117.5	195.7	352.9
Niagara RM	47.7	60.2	54.9	84.7	73.2	139.7	210.6
Peel RM	335.7	523.7	257.9	378.4	361.2	560.0	915.5
Metro Toronto	477.0	740.9	529.0	663.0	515.9	745.2	814.9
Waterloo RM	51.5	75.6	59.5	98.1	98.4	183.5	285.2
York RM	216.8	386.2	229.2	447.3	543.6	797.3	1104.5
H-W and Environs	1347.6	2130.7	1409.8	2093.2	2053.8	3130.0	4485.9
Ontario	1960.0	2935.3	2084.9	3250.5	3360.6	4886.4	6648.9
Metro Canada	4843.0	6735.0	4318.0	6293.8	6111.3	7934.0	10450.0

GREATER HAMILTON CONSTRUCTION TRENDS (REPORT 87-3)

ERRATA

The table at the bottom of Page 3 should include 88 Apartment Units and 73 Row Units in Ancaster. The revised table below shows these changes and resulting changes to total and percentage calculations.

RESIDENTIAL UNITS BY TYPE
HAMILTON - WENTWORTH REGION 1980 TO 1986

	Single Dwellings		Double Dwellings		Row Dwellings		Apartments		Conversions		TOTAL	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
ANCASTER	1,536	18	6	1	73	4	88	6	0	0	1,703	13
DUNDAS	410	5	0	0	58	3	51	3	50	34	569	4
FLAMBOROUGH	1,043	12	0	0	30	2	37	2	2	1	1,112	9
GLANBROOK	125	1	0	0	0	0	31	2	3	2	159	1
HAMILTON	3,612	41	96	12	1288	70	1,044	70	57	39	6,097	47
STONEY CREEK	2,043	23	708	87	381	21	245	16	34	23	3,411	26
H-W REGION	8,769	100	810	100	1,830	100	1,496	100	146	100	13,051	100
PERCENT OF ALL DWELLING UNITS		67.2		6.2		14.0		11.5		1.1		100.0

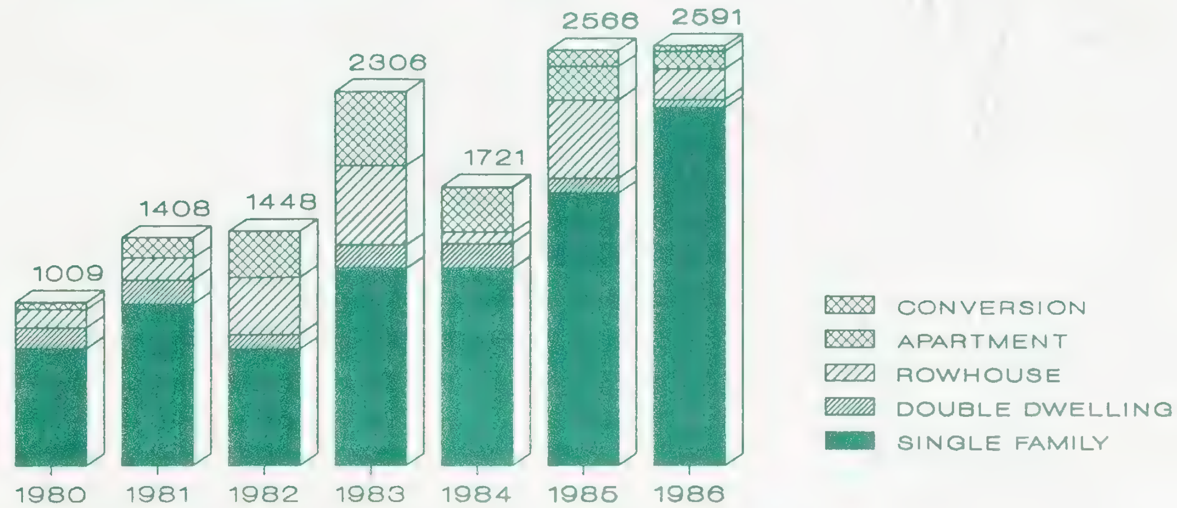
As a result of the above correction, the first sentence on Page 3 should read "...13,051 dwelling units".

The third sentence should read "...91% of row houses and 86% of apartments".

SINGLE FAMILY DWELLINGS PREDOMINATE

DWELLING TYPES 1980 TO 1986

HAMILTON - WENTWORTH REGION (NO. OF UNITS)



Single family dwellings accounted for two - thirds of the 12,928 dwelling units constructed in Hamilton - Wentworth from 1980 to 1986. Relatively little higher density building took place in spite of the rapidly rising costs of single family homes. It was concentrated in Hamilton and Stoney Creek which together accounted for 99% of double dwellings, 93% of rowhouses and 91% of apartments.

The total number of units constructed did not increase as quickly as might be expected from the rapid rise in the value of residential construction. This is due to the significant increases in per unit costs and the mix of dwellings from year to year.

RESIDENTIAL UNITS BY TYPE
HAMILTON - WENTWORTH REGION 1980 TO 1986

	Single Dwellings		Double Dwellings		Row Dwellings		Apartments		Conversions		TOTAL	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
ANCASTER	1,536	18	6	1	37	2	0	0	0	0	1,579	12
DUNDAS	410	5	0	0	59	3	51	4	50	34	570	4
FLAMBOROUGH	1,043	12	0	0	30	2	37	[illegible]	2	1	1,112	9
GLANBROOK	125	1	0	0	0	0	31	2	3	2	159	1
HAMILTON	3,612	41	96	12	1288	72	1,044	74	57	39	6,097	47
STONEY CREEK	2,043	23	708	87	381	21	245	17	34	23	3,411	26
H-W REGION	8,769	100	810	100	1,795	100	1,408	100	146	100	12,928	100
PERCENT OF ALL DWELLING UNITS		67.8		6.3		13.9		10.9		1.1		100.0

RECENT HIGH INDUSTRIAL GROWTH

INDUSTRIAL BUILDING PERMITS ($MILLIONS) - AREA MUNICIPALITIES

	1980	1981	1982	1983	1984	1985	1986	Jan-Sept 1987
Ancaster	0.3	0.2	0.2	1.1	0.3	1.2	0.4	4.1
Dundas	0.0	0.1	0.1	0.1	0.3	0.2	0.0	0.0
Flamborough	0.9	0.9	1.4	0.9	1.4	2.2	2.7	1.4
Glanbrook	0.2	0.2	10.2	0.4	4.3	1.1	0.8	0.2
Hamilton	35.6	41.2	16.2	6.2	19.5	100.8	171.5	48.6
Stoney Creek	4.8	3.8	0.6	0.8	0.5	5.2	3.8	6.1

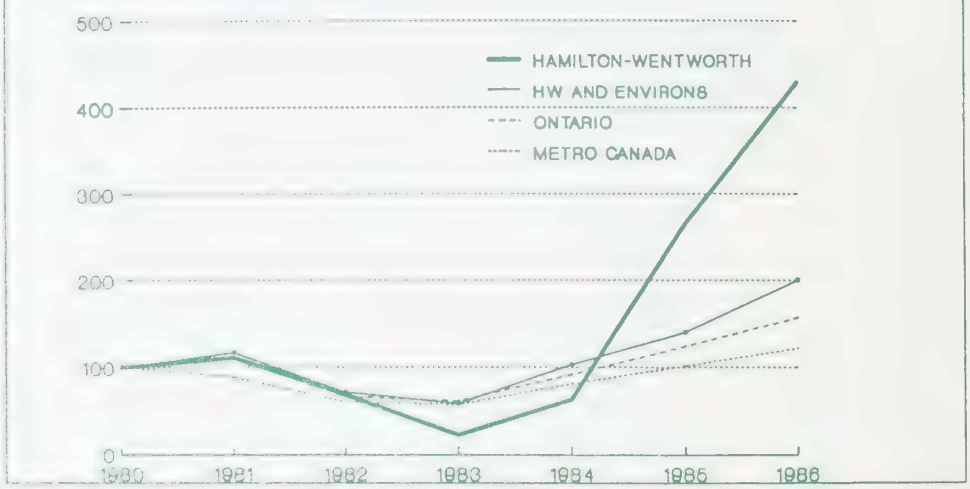
Industrial construction values showed strong improvement from the 1980-1984 period - a 320% increase for 1985 over 1984 and a 62% increase for 1986 over 1985.The 1986 value was 428% that of 1980. This growth was primarily due to modernization programs at Stelco and Dofasco. $443.0 million dollars in permits were issued from 1980 to 1986

The City of Hamilton increased its share of total activity in the Region from 85.2% in 1980 to 95.6% in 1986.

Building permit values for the first three quarters of 1987 ($60.4 million) suggest lower activity than 1986, as this is only 34% of the value for all 1986.

Hamilton-Wentworth's growth in 1985 and 1986 was better than other areas in Ontario and Canada, despite slower growth than other areas from 1980 to 1984. In 1985, the Region accounted for 17.6% of all industrial construction in urban areas near the Region (i.e. 'H-W and Environs'). This rose to 20.3% in 1986.

INDUSTRIAL CONSTRUCTION
PERCENTAGE OF 1980 VALUE



INDUSTRIAL BUILDING PERMIT VALUES ($MILLIONS) REGION AND OTHER AREAS

	1980	1981	1982	1983	1984	1985	1986
Hamilton-Wentworth RM	41.8	46.4	28.7	9.5	26.3	110.7	179.6
Brant County	10.7	6.8	3.8	3.3	7.6	4.5	10.0
Durham RM	42.7	45.4	19.5	11.3	79.5	80.7	107.2
Haldimand-Norfolk RM	20.5	12.8	8.7	1.5	4.0	3.1	5.9
Halton RM	18.3	25.9	8.9	8.1	18.0	25.2	41.5
Niagara RM	56.9	34.3	15.2	14.5	22.6	30.5	23.0
Peel RM	93.8	108.6	64.6	41.0	54.7	110.1	145.7
Metro Toronto	89.7	156.6	103.1	103.9	114.7	116.4	174.5
Waterloo RM	19.2	20.8	9.0	12.1	24.9	29.0	49.5
York RM	23.0	28.4	35.4	39.6	77.5	73.1	97.0
H-W and Environs	416.6	486.0	296.9	244.8	429.8	583.3	833.5
Ontario	710.3	784.1	468.4	435.3	654.6	880.6	1112.0
Metro Canada	1086.5	963.0	649.5	615.2	878.1	1109.2	1323.6

FLUCTUATING COMMERCIAL CONSTRUCTION

COMMERCIAL BUILDING PERMITS (\$MILLIONS)-AREA MUNICIPALITIES

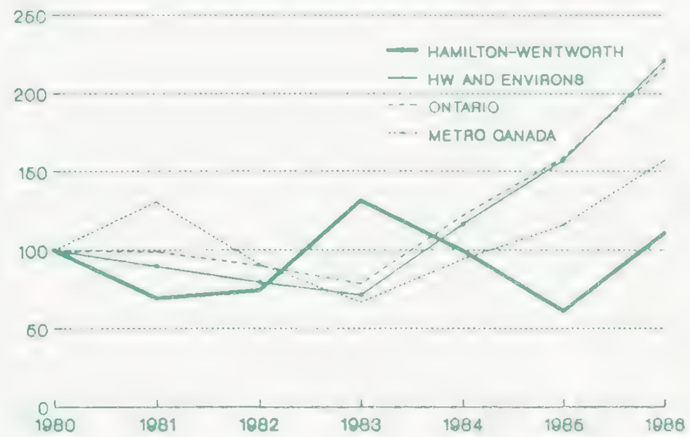
	1980	1981	1982	1983	1984	1985	1986	Jan-Sept 1987
Ancaster	2.2	0.6	0.1	0.6	0.3	0.9	1.8	2.4
Dundas	0.4	0.3	0.4	0.2	0.8	0.5	1.4	0.3
Flamborough	0.7	1.1	0.3	1.0	1.4	3.6	1.1	2.1
Glanbrook	0.2	0.2	0.4	0.2	0.1	0.2	0.2	0.2
Hamilton	48.2	31.9	37.6	67.2	49.6	21.9	48.1	51.6
Stoney Creek	2.3	3.5	1.5	1.6	1.7	6.0	7.4	4.1

Commercial construction values in Hamilton-Wentworth fluctuated considerably from 1980 to 1986. Activity was concentrated in the Hamilton downtown. \$349.7 million in permits were issued from 1980 to 1986. Although the commercial sector did not suffer as much as the industrial sector during the economic slowdown from 1980 to 1984, there was little growth in comparison to the strong growth in other sectors over 1985 and 1986. Permit values for the first 9 months of 1987 (\$60.7 million) suggest strengthening over 1986 as this represents 100% of the value for all of 1986.

Hamilton continued to account for a large, though declining, majority of activity - 89% in 1980 and 80% in 1986. Stoney Creek substantially increased its share - 4.3% in 1980 to 18.1% in 1985 and 12.3% in 1986.

Growth, however, has not kept pace with that of nearby urban areas, Ontario and metropolitan areas across Canada .

COMMERCIAL CONSTRUCTION
PERCENTAGE OF 1980 VALUE



COMMERCIAL BUILDING PERMITS (\$MILLIONS)REGION AND OTHER AREAS

	1980	1981	1982	1983	1984	1985	1986
Hamilton-Wentworth RM	54.0	37.6	40.3	70.8	53.9	33.1	60.0
Brant County	8.6	4.7	3.5	4.4	6.6	31.5	19.3
Durham RM	29.1	20.2	55.3	17.7	44.0	50.7	63.0
Haldimand-Norfolk RM	5.4	9.2	2.4	4.3	2.4	3.6	4.3
Halton RM	45.7	40.8	16.7	15.8	36.8	53.3	51.8
Niagara RM	31.8	30.5	16.5	24.0	32.2	39.8	49.0
Peel RM	137.8	181.2	58.0	56.9	170.7	267.2	457.0
Metro Toronto	519.5	425.0	514.7	426.3	651.6	734.5	1020.5
Waterloo RM	30.1	35.8	18.6	20.0	26.0	51.4	111.8
York RM	110.1	88.3	48.4	51.8	107.0	258.4	311.2
H-W and Environs	972.1	873.3	774.4	692.0	1131.2	1523.5	2147.9
Ontario	1307.0	1291.1	1170.6	1026.8	1587.8	2075.0	2820.2
Metro Canada	3185.6	4151.0	2890.3	2136.4	2987.1	3689.8	4996.9

HIGH INSTITUTIONAL GROWTH IN 1986

INSTITUTIONAL BUILDING PERMITS ($MILLIONS) - AREA MUNICIPALITIES

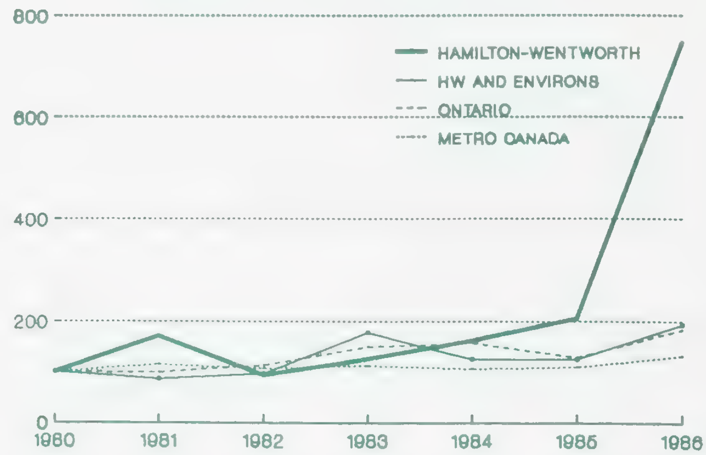
	1980	1981	1982	1983	1984	1985	1986	Jan-Sept 1987
Ancaster	0.0	0.0	0.1	0.3	0.0	6.6	0.7	0.6
Dundas	0.0	0.1	2.3	0.1	0.1	1.2	0.3	1.2
Flamborough	0.1	0.3	0.1	0.8	0.5	1.0	0.1	0.2
Glanbrook	0.0	0.0	0.2	0.1	0.0	0.0	0.0	1.0
Hamilton	8.9	14.1	6.1	10.4	15.9	8.8	75.8	30.7
Stoney Creek	1.8	4.0	1.4	1.9	1.0	4.7	3.8	3.6

The value of institutional construction in Hamilton-Wentworth grew steadily from 1980 to 1986 with very strong activity in 1981 and 1986. In 1981, building permits were issued for the downtown Hamilton provincial government building, and in 1986 permits worth $52.8 million were issued for expansion at the Hamilton General Hospital. $174.0 million in permits were issued from 1980 to 1986. Activity in the first three quarters of 1987 ($37.4 million) suggests a return to slower growth as it represents 46% of the value for all of 1986.

Hamilton accounted for a majority (80.5%) of activity from 1980 to 1986. Other area municipalities had varying shares in the period. For example, the building of Redeemer College gave Ancaster 29.6% of the value of activity in 1985.

Hamilton-Wentworth's rate of growth from 1980 to 1985 roughly parallelled growth for urban municipalities in Ontario and other parts of Canada. From 1984 to 1986, activity in the Region constituted 16.9% of all activity in urban areas near the Region ('HW and Environs').

INSTITUTIONAL CONSTRUCTION PERCENTAGE OF 1980 VALUE



INSTITUTIONAL BUILDING PERMITS ($MILLIONS) REGION AND OTHER AREAS

	1980	1981	1982	1983	1984	1985	1986
Hamilton-Wentworth RM	10.8	18.5	10.2	13.6	17.5	22.3	80.7
Brant County	3.3	1.1	9.2	3.8	4.1	3.3	12.9
Durham RM	10.5	24.5	23.1	24.0	8.4	12.3	28.1
Haldimand-Norfolk RM	1.2	1.9	6.1	2.9	2.0	0.5	1.9
Halton RM	8.4	5.6	6.4	10.6	11.7	36.3	15.3
Niagara RM	11.0	25.4	20.1	15.5	10.3	9.7	12.5
Peel RM	62.9	17.3	34.4	80.0	81.4	22.7	34.0
Metro Toronto	104.7	82.1	94.7	236.9	127.7	130.4	213.5
Waterloo RM	6.1	18.5	7.9	14.2	11.4	38.4	23.4
York RM	24.4	11.9	21.4	29.1	31.0	25.9	46.0
H-W and Environs	243.3	206.8	233.5	430.6	305.5	301.8	468.3
Ontario	427.6	419.1	487.3	637.3	671.3	550.6	778.4
Metro Canada	1117.4	1270.0	1192.8	1252.9	1178.2	1220.3	1476.0

HIGH TOTAL GROWTH

TOTAL BUILDING PERMITS ($MILLIONS) - AREA MUNICIPALITIES

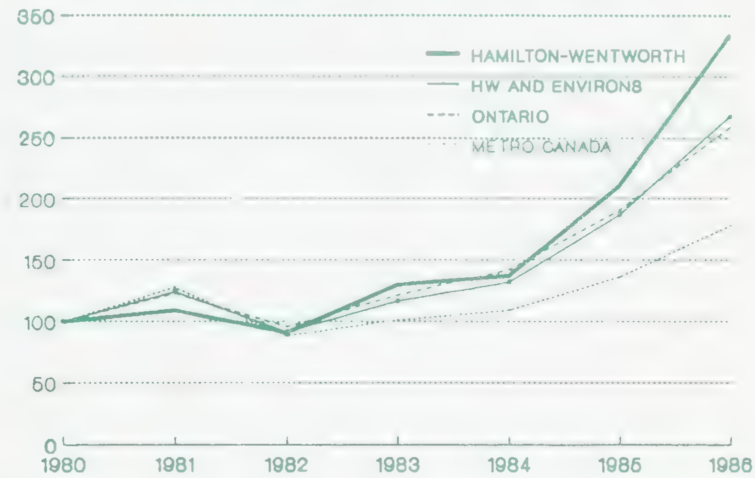
	1980	1981	1982	1983	1984	1985	1986	Jan-Sept 1987
Ancaster	11.3	11.2	8.4	21.6	22.4	35.0	45.3	49.4
Dundas	1.3	5.6	6.0	6.1	5.8	12.3	9.9	31.3
Flamborough	7.4	10.8	8.2	15.7	18.0	26.8	28.5	27.3
Glanbrook	2.3	1.9	12.2	3.4	6.4	4.1	4.8	5.4
Hamilton	113.9	111.3	92.0	125.6	131.1	199.3	381.2	249.7
Stoney Creek	22.7	33.1	17.0	34.2	34.1	56.8	60.6	55.6

Annual values rose dramatically in 1985 and 1986 following strong growth from 1980 to 1984. Values rose significantly, even when adjusted for inflation. Nearly $1.8 billion dollars in building permits were issued from 1980 to 1986. In the first 9 months of 1987, $418.8 million in permits have been issued, 79% of the value for all of 1986 - this suggests that the current high level of activity will be maintained throughout 1987.

Hamilton accounted for 65.4% of total building permit values from 1980 to 1986, Stoney Creek 14.6%, Ancaster 8.8%, Flamborough 6.5%, Dundas 3.7% and Glanbrook 2.0%.

Hamilton - Wentworth's growth in value of construction activity kept pace with that of other areas from 1980 to 1984 and was considerably better in 1985 and 1986. The Region's growth was based on continuing strong single family home construction and major industrial and institutional expansion. Commercial construction was not as strong as other sectors.

TOTAL CONSTRUCTION
PERCENTAGE OF 1980 VALUE



TOTAL BUILDING PERMITS REGION AND OTHER AREAS

	1980	1981	1982	1983	1984	1985	1986
Hamilton-Wentworth RM	158.9	173.9	143.8	206.6	217.8	334.5	530.3
Brant County	26.9	20.8	27.2	29.9	35.8	59.7	79.8
Durham RM	145.5	232.9	233.3	229.5	321.3	440.0	724.1
Haldimand-Norfolk RM	44.2	38.6	28.3	25.6	25.7	33.5	40.7
Halton RM	145.2	179.1	89.6	131.7	184.1	310.5	461.5
Niagara RM	147.4	150.4	106.7	138.6	138.2	219.7	295.1
Peel RM	630.2	830.7	415.0	556.3	668.0	959.9	1552.2
Metro Toronto	1190.9	1404.6	1241.6	1430.2	1409.8	1726.5	2223.4
Waterloo RM	106.9	150.8	95.0	144.3	160.7	302.3	470.0
York RM	374.4	514.8	334.3	567.7	759.2	1154.6	1558.8
H-W and Environs	2970.6	3696.6	2714.8	3460.4	3920.6	5541.0	7935.9
Ontario	4404.9	5420.6	4211.1	5348.9	6274.3	8392.6	11359.5
Metro Canada	10232.4	13119.0	9050.5	10298.4	11154.6	13953.2	18246.4

TOTAL VALUE OF BUILDING PERMITS

AREA MUNICIPALITIES 1980 TO 1986

This is one in a series of information bulletins produced by the Regional Planning Branch of the Planning and Development Department, Regional Municipality of Hamilton - Wentworth.

Other bulletins currently available:

Greater Hamilton Population Trends (Report 87-1)

Greater Hamilton Labour Force (Report 87-2)

Greater Hamilton Industrial Development (Report 87-4)

For further information, please contact Chris Walker at 526 - 4219

GREATER HAMILTON
THE REGIONAL CENTRE
DEVELOPMENT REPORT 88-2

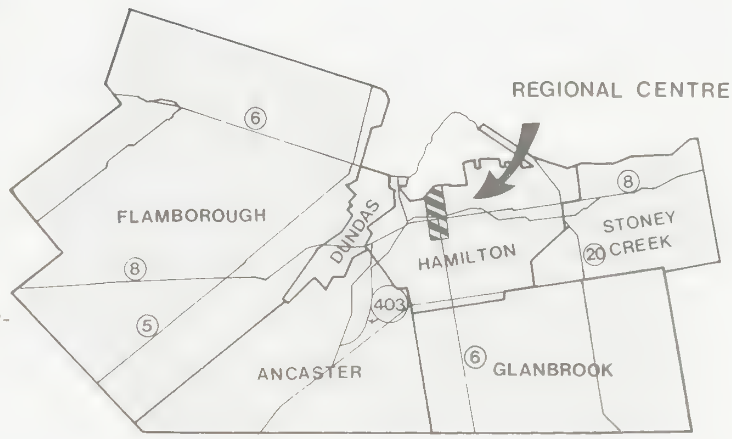
Hamilton-Wentworth Region • Planning and Development Department • Strategic Planning Division

Introduction

The Regional Centre of Hamilton-Wentworth provides vital commercial, institutional, cultural, recreational, social and health services and facilities to the residents of Hamilton-Wentworth and to a larger hinterland. Ongoing redevelopment projects and proposed improvements attest to the continuing vibrance of the Centre.

The Regional Centre encompasses 1,250 acres and is bounded by the Niagara Escarpment (south), the Hamilton Harbour (north), Queen Street (west), and Victoria Avenue (east). The heart of the Regional Centre is the downtown core, with its many retail shops, public and private offices, and cultural, recreational, and institutional facilities. Residential uses predominate north and south of the core. A significant number of industrial uses are located north of the core.

REGIONAL CENTRE LOCATION
IN HAMILTON-WENTWORTH



Highlights...

Commercial development in the Regional Centre includes approximately 3.5 million sq. ft. of retail floor space and 4 million sq. ft. of large office space.

Large office space increased by 5.6% between 1985 and 1987, and retail space will increase by 5.7% with the completion of the new Eaton's Centre in 1989.

The average net rental rate for prime office space is roughly one-half of rent for comparable space in downtown Toronto.

Institutional activities, such as government, health and non-profit services, employ more than 9,000 persons in the Regional Centre (including 6,000 persons employed at St. Joseph's and Hamilton General Hospitals).

Residential uses, including 173 apartment buildings, occupy 43% of land. Many of the 34,600 people living here are either over 65 (19%) or between the ages of 25 and 34 (22%).

Cultural, recreational and specialized services attract people from within a 60 kilometre radius. Public expenditures of $300 million for urban redevelopment between 1972 and 1987 have produced many prominent new service facilities and stimulated private investment in office, retail, and residential sectors.

A comprehensive transportation network services the Regional Centre with public transit (HSR and GO), a grid street system providing good access to Hwy 403, and 8,400 parking spaces.

Downtown Action Plan expenditures by the City of Hamilton of $10 million have introduced significant new pedestrian and streetscape improvements.

The proposed Perimeter Road and the planned expansion of GO train service at the TH&B station will improve transportation service and reduce through and truck traffic in commercial and residential districts.

ACTIVITY IN THE REGIONAL CENTRE

1. Commercial

Commercial activities occupy approximately 12% of the land, mainly in an East-West strip between Cannon and Hunter Streets in the downtown core. Additional commercial concentrations are located north and south of these boundaries on James Street.

1.1 Retail

There are approximately 3.5 million sq. ft. of retail space in the Centre, 17% of the Regional total.

Unique retail shopping districts, such as Jackson Square, Hess Village, the Downtown Promenade, International Village, King William Street, James Street South, and James Street North, contribute to the diversity and character of the Regional Centre.

The estimated value of retail sales in the Regional Centre in 1987 was $448 million.

The retail sector is continuing to expand. The most prominent new development is the $100 million Eaton's Centre on James Street North, expected to open in 1989. It will contain 510,000 sq. ft. of retail floor space, almost 200,000 sq. ft. more than the existing structure.

1.2 Office

There are 60 large office buildings, containing almost 4 million sq. ft. of floor space. This represents 84% of the large office space in the Region.

There was a 5.6% increase (224,000 sq. ft.) in large office space between 1985 and 1987, due to construction of new buildings for lease and expansion of existing buildings.

Several office projects, including the renovation of the historic Bank of Montreal building on James Street South and the construction of a Regional headquarters and Phase II of the CIBC development, are currently in the planning stages.

The vacancy rate in private competitive large offices was 17.6% in 1987, down from 28.2% in 1985. The most dramatic drop in vacancy rates was in buildings renting for $14.00/sq. ft. or more, where rates declined from 43.4% to 13.0%.

Average net rent for prime office space is $16.00/sq. ft., about half the average for comparable space in downtown Toronto.

Largest Private Offices
Regional Centre, 1987

	sq. ft.
Standard Life	409,500
Stelco Towers	337,500
Commerce Place 1	183,600
IBM/25 Main West	132,600
Bell Canada (Bay St. S.)	128,900
Century 21	104,000
Bell Canada (Jackson St. W.)	103,700
Terminal Towers	100,000

Recent And Planned Large Office Development

Completed in 1987	Planned
1. Commerce Place I (183,648 sq. ft.)	1. Commerce Place II: 2nd Phase of CIBC Development
2. Sun Life Addition (15,000 sq. ft.)	2. Bank of Montreal Development: Restoration of Building and Construction of 13-storey office tower
3. CHAM Centre (14,000 sq. ft.)	3. Regional Office Building: Mixed Use Development with a 15-storey office tower
4. 44 Hughson St. S. (Extensive Renovations)	4. Medical Office Building: Sited adjacent to Hamilton General Hospital

Note: Large offices are office buildings containing at least 10,000 sq. ft. of floor space

Recent And Planned Retail and Mixed Use Development

Completed in 1987	Under Construction	Planned
1. CHAM Centre (York at Bay)	1. Eaton's Centre	1. Atrium Square (Catharine Street)
2. Centre Point (Wilson Street)	2. Plaza on Cannon East	2. Zellers Redevelopment (James Street North)
3. Commercial Plaza (James North)		3. Mixed Use Development (18 Main Street East)
4. Commercial Plaza (King East)		

2. Industrial

Industrial uses are located predominantly north of the downtown core. The 91 industrial properties cover 12% of the land (150 acres). The most common industrial establishments are food processing, metal fabricating, printing, and auto collision and repair.

3. Institutional

Institutional activities cover approximately 130 acres of land and employ approximately 10,000 persons.

3.1 Government

There are 11 large public office buildings, with total employment of almost 4,000 persons. The largest are the Ellen Fairclough Building (233,910 sq. ft.), the Federal Government Building (179,725 sq. ft.), Hamilton City Hall (101,545 sq. ft.), Hamilton Main Post Office (99,182 sq. ft.), and the Hamilton-Wentworth Police Department Headquarters (96,182 sq. ft.).

In 1987, the Ministry of the Attorney General established a regional headquarters in Century 21. Currently, the historic Hamilton Public Library building is being renovated for use as a Unified Family Court. Within 5 years, the Regional Municipality of Hamilton-Wentworth plans to move to a new office tower on Bay Street. The 15-storey tower will be part of a mixed use development with residential condominiums, underground parking, a shopping mall, and an elevated pedestrian bridge to the Jackson Square complex.

3.2 Health

Two major hospitals, employing 6,000 persons, provide health services. St. Joseph's specializes in kidney transplants and dialysis, and Hamilton General in burns and neurosurgery. Both hospitals have recently undertaken extensive modernization programs. Further expansion of the health sector will occur when a planned medical office, adjacent to Hamilton General Hospital, is constructed.

3.3 Non-Profit

The Regional Centre contains one-third of Hamilton-Wentworth's more than 300 non-profit organizations. These organizations serve Regional residents, and often a larger hinterland.

4. Residential

Residential uses account for 43% of the land (540 acres). Forty-six percent of residential land is concentrated in the neighbourhoods of Durand and Corktown, located south of Main Street. Other residential land is north of the downtown in the neighbourhoods of Central, Beasley, North End East, and North End West. (see map, pg. 8)

Sixty-seven percent of the 18,900 dwelling units in the Regional Centre are in apartment buildings. Thirty percent of all apartment units in Hamilton-Wentworth are concentrated here.

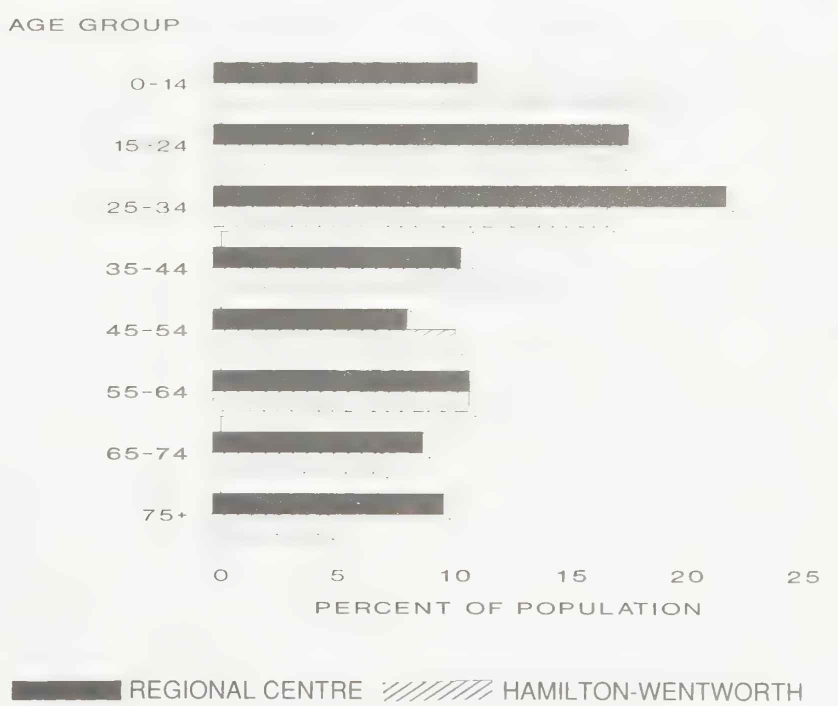
The number of dwelling units remained relatively constant between 1980 and 1985. The high costs of land and the economics of rental apartments have discouraged residential development. However, several new condominiums have been constructed in Durand Neighbourhood since 1985. Currently, the historic Pigott and Sun Life buildings are being renovated as a mixed use development containing 110 residential units.

5. Population

There are approximately 34,600 people living in the Regional Centre. A large percentage of the population is over 65 (19% compared to 12% in the Region) or between 25 and 34 years of age (22% compared to 17% in the Region). The elderly are attracted by the availability of rental accommodation, public transportation, and a variety of services; while 25 to 34 year olds are attracted to the lifestyle, employment, and rental housing opportunities. Families with young children form a smaller percentage of the population.

POPULATION AGE DISTRIBUTION

HAMILTON-WENTWORTH AND REGIONAL CENTRE, 1985



Source: Ontario Ministry of Revenue, Assessment Division, and The Hamilton-Wentworth Planning and Development Department

6. Services

The Regional Centre provides specialized cultural, recreational, and convention services to Hamilton-Wentworth and a larger hinterland.

6.1 Convention

A modern 13-room Convention Centre and 3 major hotels, with a combined capacity of 700 guests, are located in the Regional Centre. In 1987, these facilities accommodated more than 141 conventions and 76,800 delegates. In 1988, convention facilities are expected to accommodate approximately 200 conventions and 100,000 delegates.

6.2 Cultural/Recreational

Regional Centre cultural and recreational facilities include: Hamilton Place, a 2,000-seat theatre/auditorium complex; the Hamilton Art Gallery, containing the 4th largest permanent art collection of the more than 250 public galleries in Canada; and, Copps Coliseum, a 17,500-seat arena/trade centre suitable for hosting a wide range of events.

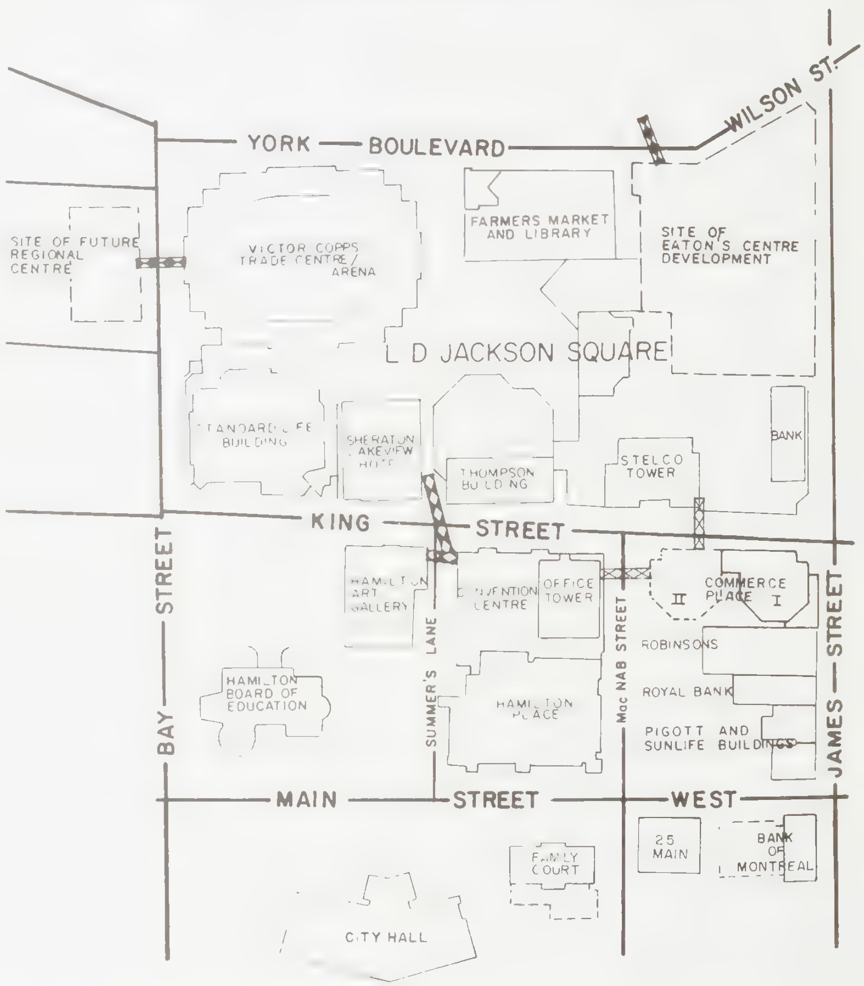
Cultural and recreational facilities serve a market extending into seven other Regions. For example, Copps Coliseum draws audiences from Hamilton-Wentworth, Metro Toronto, Peel, Wellington, Halton, Waterloo, Brant, and Niagara. In 1987, events at Copps Coliseum attracted a combined audience of 708,000 people, 17% more than in 1986.

Plans exist for additional cultural and recreational facilities. An $8 million theatre, with a seating capacity of 500 to 750 persons, is planned for King William Street to accommodate Hamilton's Theatre Aquarius Group. A Waterfront Park is planned for the West Harbour. This Park may include a craft and cultural centre, an Imax theatre, resaurants, a waterfront plaza, pedestrian networks, expanded marina facilities, and a children's area.

7. Historic Buildings

The character and attractiveness of the Regional Centre is, in part, conditioned by its many architecturally and historically significant buildings. The 42 buildings in the Regional Centre designated under the Ontario Heritage Act account for over one-third of the historically designated buildings in the Region. Many of these buildings are associated with historic preservation projects. Examples include: Park Place and the Bank of Montreal Building (retail/office); Central Public School, Unified Family Court, St. Paul's Presbyterian Church and Custom House (institutional); and, Sandyford Place, Pigott Building, Sun Life Building and Ballinahinch (residential).

REDEVELOPMENT AREA



Urban redevelopment involved investment of more than $300 million between 1972 and 1987. Many specialized service facilities were completed during this time: the Hamilton Public Library, the Farmers' Market, the Hamilton Convention Centre, the Sheraton Hotel, and Copps Coliseum. Other components of urban redevelopment were: Stelco Tower, the Robert Thomson Building, the Ellen Fairclough Building, and the Standard Life Building.

Redevelopment is continuing with construction of the new Eaton's Centre and the renovation of the old library for use as a Unified Family Court. Future development will include: a Regional office development, the renovation and expansion at the Bank of Montreal building, and the construction of Commerce Place II.

Existing ( ), committed ( ), and proposed ( ) pedestrian bridges are part of an elevated walkway system which includes plazas above Jackson Square and the Hamilton Art Gallery.

MAJOR DEVELOPMENT (1960 - 1988)

PROJECT	YEAR
Completed	
1 Hamilton City Hall	1960
2 St. Joseph's Hospital	1962
3 Holiday Inn	1966
4 Terminal Towers	1966
5 Hamilton Board of Education	1967
6 Alexandra Square	1968
7 YWCA	1968
8 Sir John A. MacDonald S.S.	1970
9 Canadian Football Hall of Fame	1971
10 IBM/25 Main St. West	1971
11 Hess Village	1972
12 Jackson Square	1972
13 Century 21	1973
14 Hamilton Place	1973
15 First City Trust	1974
16 First Place	1974
17 YMCA Phys. Ed. Building	1976
18 Art Gallery of Hamilton	1977
19 Bell Canada (Bay Street)	1977
20 Ham.-Went. Police Station	1977
21 Jackson Sq./Robert Thomson	1977
22 Regional Detention Centre	1978
23 Central Public School	1980
24 Farmers Market/Library	1980
25 Hamilton Convention Centre	1981
26 Ellen Fairclough Building	1982
27 CHCH TV	1984
28 Park Place	1984
29 Standard Life Building	1984
30 Sheraton Hotel	1985
31 Royal Connaught Hotel	1986
32 Copps Coliseum	1986
33 Commerce Place I	1987
34 York Boulevard Parkade	1987
35 General Hospital Expansion	1988
In Progress	
36 Custom House	1988
37 Eaton's Centre	1989
38 Heritage Gardens	1990
39 St.Joseph's Hospital Expansion	1988
40 Unified Family Court	1988
Proposed	
41 Atrium Square	
42 Bank of Montreal Development	
43 Commerce Place II	
44 Zellers Redevelopment	
45 Regional Office Development	
46 Theatre Aquarius	
47 Waterfront Park	
48 Medical Office	
49 Mixed Use Development	

8. Transportation

Access to and within the Centre is provided by a transportation system that includes public transit services, vehicular and pedestrian networks, and parking areas.

8.1 Public Transit

The Regional Centre is serviced by the Hamilton Street Railway (HSR), GO Transit, Greyhound, and Canada Coach.

The HSR has 20 routes connecting to Stoney Creek, Dundas, and Hamilton. Average weekday ridership in and out of the downtown is about 72,000 passengers.

GO buses and trains connect to Toronto with frequent express buses (every 20 minutes during rush hour), buses connecting to trains in Oakville, Lakeshore West buses, and three GO trains daily. Daily GO ridership to and from the Regional Centre is about 4,200.

There are plans for GO train service to be moved to the TH&B station on Hunter Street from the CNR station on James Street North. A multi-modal station at the TH&B site would accommodate train service, GO and other inter-city buses, HSR connections and a parking ramp. Timing for this expansion will be determined after completion of an environmental assessment of the proposal.

8.2 Pedestrian Improvements

Programs, such as the Downtown Action Plan, help create an attractive pedestrian environment. Many streets received new sidewalks, lighting, trees and benches through the $10 million program. The improvement area occupies over 100 acres north of Main and east of James Streets.

A pedestrian bridge between the Convention Centre and Sheraton Hotel is part of an elevated walkway system. Possible future bridges will link Jackson Square to the CIBC building, the York Boulevard Parkade, and the planned Regional office tower.

8.3 Streets

Roadways follow a North-South, East-West grid pattern. Most major streets are one way. There is good access from Hwy 403, with exits to Main Street East, Aberdeen Avenue, and York Boulevard.

Approximately 287,000 vehicles enter and leave the downtown on an average weekday. During a PM peak in 1987, 24,600 vehicles were counted entering and leaving the Regional Centre, 2% more than in 1980.

The construction of the proposed Perimeter Road will provide a direct controlled access connection between Burlington Street and Hwy 403. This should improve the urban environment of the Centre by reducing truck and through traffic in residential and commercial districts.

8.4 Parking

There are 48 publicly and privately owned parking lots available for public use. The number of spaces increased from 8,228 in 1984 to 8,439 in 1987. Ninety-six percent of the lots are concentrated within a 10-minute walk of King and James Streets.

The City of Hamilton owns 15 lots (3,248 spaces), including a new 814-space parkade on York Boulevard.

The use of parking facilities decreased between 1984 and 1987. The average accumulation of parked vehicles between 10 a.m. and 4 p.m. was 6,265 (76% of capacity) in 1984 and 5,990 (71% of capacity) in 1987.

The planned Regional government office development on Bay Street will include 850 parking spaces. Also, the City of Hamilton's Five-Year Capital Budget contains plans to acquire at least 2 more properties for parking lots. Additional funds are available to develop facilities through joint ventures between the Parking Authority and private developers.

9. Planning Initiatives

The importance of the Regional Centre is reflected in planning initiatives designed to provide standards for future development.

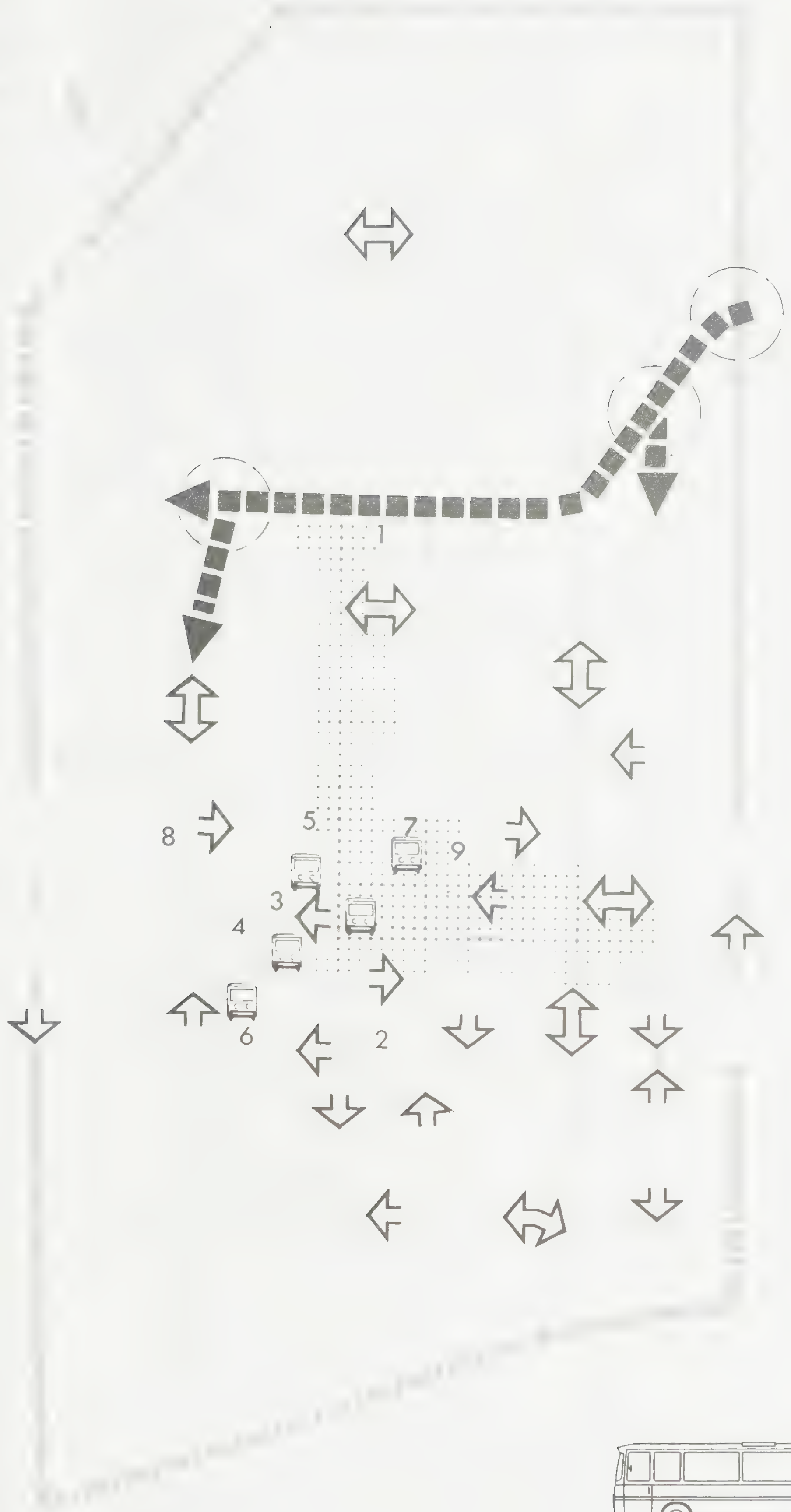
The Central Area Plan is a document providing policy directions for the Regional Centre to the year 2001. It encourages balanced growth through guidelines for residential, commercial, institutional, industrial, recreational and cultural land use.

The Central Area Plan Implementation Committee (CAPIC) gives advice to the Planning and Development Committee of Hamilton City Council on actions regarding the implementation of the Central Area Plan. Its membership includes representatives of organizations with an interest in the Regional Centre, such as the Downtown Promenade Business Improvement Association and the Chamber of Commerce.

Local planning is conducted at the level of Planning Neighbourhoods. The Regional Centre contains six Neighbourhoods - Durand, Corktown, Central, Beasley, North End East, and North End West, as well as parts of Landsdale, Stinson, and Keith. Neighbourhood Plans provide guidelines for balanced attractive development at the local level.

Summary

New development, such as Copps Coliseum, Commerce Place and the new Eaton's Centre and the preservation of historic buildings, such as the Public Library and the Right House, reflect the future potential and the heritage of the Regional Centre. Proposed developments, such as the Regional government headquarters, new theatre facilities and a waterfront park, will build upon the strengths of the Centre while ensuring its continuing viability.



TRANSPORTATION

Train Stations

1 CNR
2 TH&B

Major Parking Lots

3 Jackson Sq. Underground (864 spaces)
4 King St. and Summers Lane (829 spaces)
5 York Boulevard Parkade (814 spaces)
6 City Hall (389 spaces)
7 Wilson Street (312 spaces)
8 Bay and Napier (300 spaces)

Hamilton Bus Terminal

9 Go Buses, Canada Coach, and Greyhound.

H.S.R. Major Loading Points

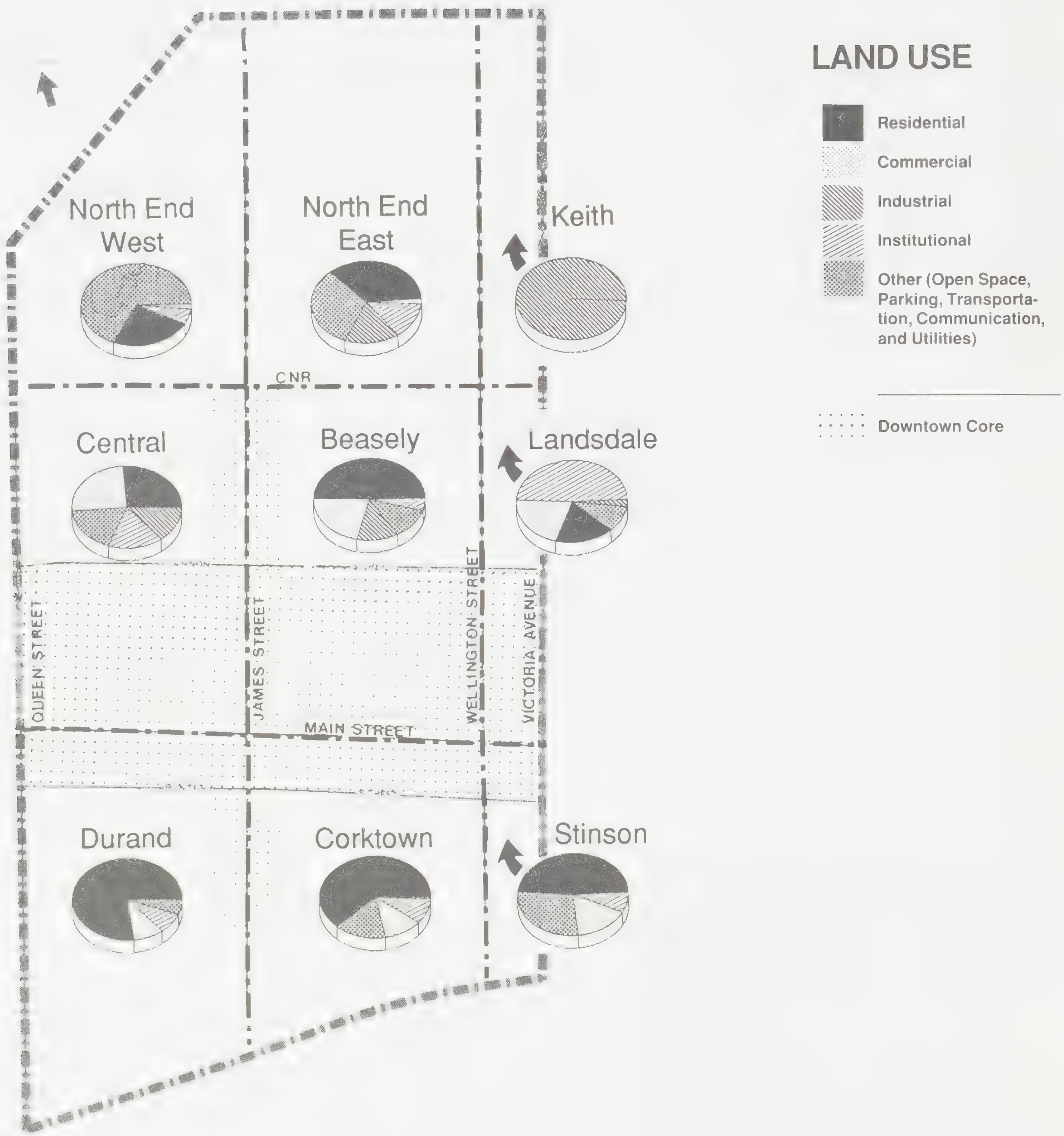
Proposed Perimeter Road

Proposed Interchanges

Direction of Traffic Flows

Downtown Action Plan

Shading designates area eligible for pedestrian and streetscape improvements under this program.



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- Greater Hamilton Construction Trends (Report 87-3)
- Greater Hamilton Industrial Development (Report 87-4)
- Greater Hamilton Large Office Inventory (Report 88-1)

For further information, please contact Julie Bergshoeff at 526-4348.

Greater Hamilton Economic Trends
Economics Report 89-2

Hamilton-Wentworth Region . Planning and Development Department . Strategic Planning Division

Introduction

This bulletin outlines economic trends occurring within the Region of Hamilton-Wentworth since the recession of 1982-83, with particular emphasis on the post-1986 time period.

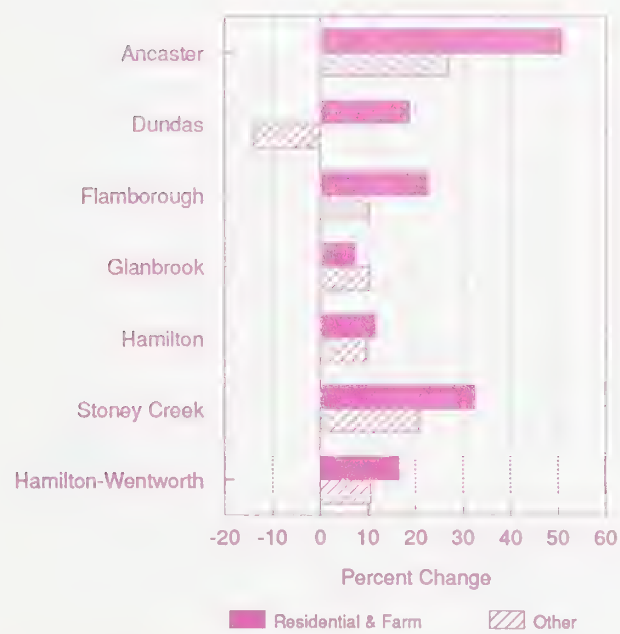
1.0 Assessment

Total assessment in the Region expanded by 14.2 % between 1981 and 1988. Growth in residential assessment has outpaced all other assessment growth. Residential assessment expanded in all of the area municipalities, increasing by 16.6 % within the Region. Other assessment within the Region expanded by 10.6 %.

Highlights ...

- The total labour force in the Hamilton CMA increased by 20.5 % between 1981 and 1986, while unemployment levels have remained in the 6.5 % range since 1984.
- Thirty-seven percent of the Region's labour force was employed in the service sector in 1986, up from 33.0 % in 1981.
- The total value of building permits issued between 1981 and 1988 has increased by 192.5 %. In 1988, residential building permits accounted for 68.7 % of all of the building permits issued.
- Manufacturing value added per employee increased by 24.8 %, from $58,475 to $72,985 per employee (1981 constant dollars) between 1980 - 1985.
- Since the 1982-83 recession, the steel industry has made a full recovery, and is currently embarking on major capital improvements.
- In 1988, real total retail sales were 31.0 % above the 1981 level.
- Business establishments within the Region have increased by 32.6 % since 1985.
- Real per capita income grew by 16.7 % between 1986 and 1988.

Percent Change in Assessment
Area Municipalities, 1981 to 1988
(Current Dollars)



Note: Other refers to commercial, industrial and business assessment

Source: Assessment Files.

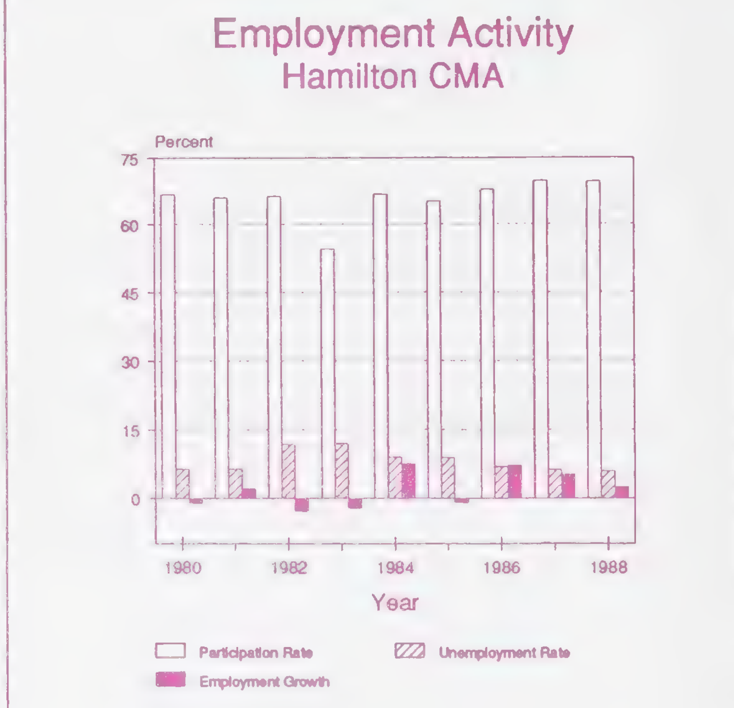
2.0 Employment

Employment activity within the Greater Hamilton CMA has remained strong between 1980 and 1988, with the total labour force increasing by 20.5 % from 268,000 to 323,000. Even with this expansion in the labour force, unemployment rates have fallen annually in the post-recession period after a peak of over 11.0 % in 1982 to 6.1 % in 1988.

Participation rates within the CMA have remained at or near 65 % throughout the 1980's. The labour force has experienced positive growth, except for the 1982-83 recession and in 1985. The positive growth in the labour force since 1985 has offset the decline of 1982, 1983, and 1985.

The expanding labour force and a declining unemployment rate suggests that job creation in the CMA has been sufficient to absorb the annual increase in the size of the labour force.

Note: The Hamilton CMA includes Hamilton-Wentworth, Burlington and Grimsby.



Source: Statistics Canada, Catalogue No. 71-001.

2.1 Employment by Industrial Sector

Within the Region, total employment increased by four percent between 1981 and 1986. A shift in employment occurred away from manufacturing towards the service sector. In 1986, business services overtook manufacturing as the largest industrial employment sector. Manufacturing employment declined by approximately 12.0 % while total employment in trade, transportation, communications, and utilities, finance, real estate and other business services all expanded by 14.5 %.

Primary industries (extractive, farming) experienced a significant growth of nearly 18.0 %. This growth rate was well above the provincial average for 1981 to 1986, where total employment in primary industries declined.

With the increase in employment in business (Financial, Insurance and Real Estate and other) services, the service sector now accounts for a total of 37.0 % of the total employment of residents of the Region. This is an increase from the 1981 level when the service sector accounted for 33.0 % of the labour force.

Labour Force Employment by Industrial Sector

Industry Sector	1981	1986	% Change 1981-1986
Primary	3,905	4,595	17.7
Manufacturing	69,945	61,575	-12.0
Construction	12,715	13,200	3.8
Transportation *	10,955	11,325	3.4
Trade	32,900	37,610	14.3
FIRE *	8,875	10,375	16.9
Government	7,725	7,635	-1.2
Other Services	59,000	68,580	16.2
Total	206,020	214,895	4.3

* Transportation includes communications and utilities; FIRE refers to Finance, Insurance and Real Estate

Source: Statistics Canada, Special Run (1981), 94-114 (1986)

3.0 Business Activity

The number of business establishments within the Region has increased since 1985 by 4,377, or 32.6 %. All Area Municipalities have experienced growth in the number of business establishments; Hamilton attracted the largest share at 76.3 %, followed by Stoney Creek at 12.3 %. The percentage share of the increase in the other Area Municipalities was: Ancaster, 3.2 %; Dundas 2.4 %; Flamborough, 4.0 %; and Glanbrook 1.8 %.

Within the Region, the geographical distribution of business establishments has remained fairly constant from 1985 to 1988. The highest concentration is found in Hamilton. The distribution of firms in 1988 was: Ancaster, 2.7 %; Dundas, 3.5 %; Flamborough, 4.4 %; Glanbrook, 1.6 %; Hamilton, 76.8 %, and Stoney Creek, 11.0 %.

Number of Business Establishments
Industrial and Commercial
Area Municipalities, 1985 - 1988

	1985	1988	% Change 1985-1988
Ancaster	338	478	41.4
Dundas	521	625	20.0
Flamborough	612	789	28.9
Glanbrook	202	281	39.1
Hamilton	10,346	13,685	32.3
Stoney Creek	1,424	1,962	37.8
Total	13,443	17,820	32.6

Source: Municipal Assessment Files.

3.1 Retail Activity

Retail activities within the Region have continued to expand with an increase of over 85 % in total retail sales since 1981; or over 31 % when adjusted for inflation. Continued growth in total retail sales indicates strong consumer confidence regarding the local economy. Per capita retail sales have increased by 78 % between 1981 and 1988 reflecting the increase in per capita income.

Between 1986 and 1988, hardware stores (77.6 %), motor vehicle dealers (37.1 %) and furniture, appliances, TV and radio (26.9 %) were the fastest growing retail sector. Food sales as a percentage of total sales decreased in this time period, suggesting that residents have more disposable income to spend on other goods.

Retail Sales
Hamilton-Wentworth, 1986 - 1988
(Millions of Current Dollars)

	1986	1988	% Change 1986-88
Food Stores	587.1	618.0	5.3
Motor Vehicles	439.0	602.5	37.1
Service Stations	180.8	204.3	13.0
Apparel	126.8	144.9	14.3
Hardware	15.2	27.0	77.6
Furniture	56.2	71.3	26.9
Other	970.9	1,141.8	17.6

Source: Financial Post, Canadian Urban Markets, 1986, 1988.

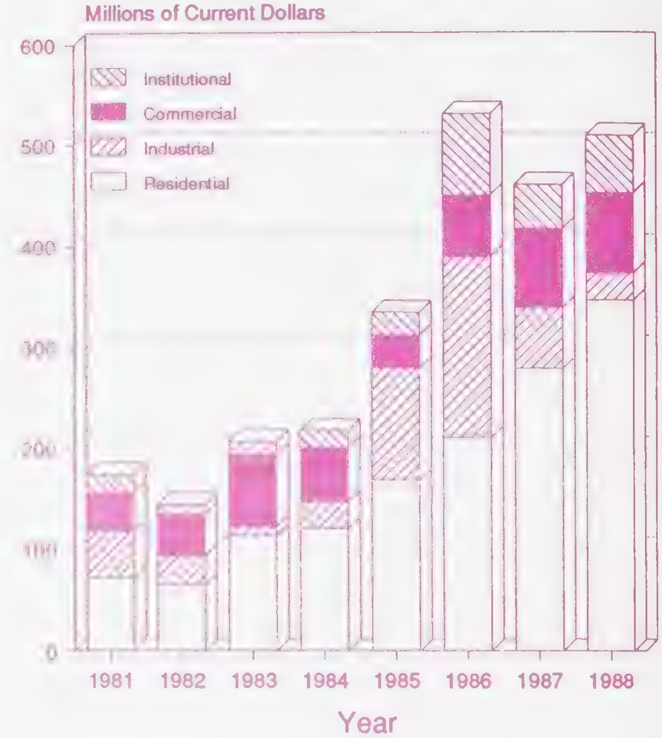
4.0 Construction

Between 1981 and 1988, the total value of annual building permits issued increased by 181.3 %. The peak year for the value of building permits issued was 1986.

All of the Area Municipalities have experienced a growth in the total value of permits issued. Dundas posted the largest relative increase in permit values. Strong growth has also occured in the other Area Municipalities: Ancaster, 372 %; Flamborough, 391 %; Glanbrook, 300 %; Hamilton, 128 %; and Stoney Creek, 183 %.

The City of Hamilton has continued to account for the majority of the total value of building permits issued. However, this share has been declining from a high in 1980 of 71.7 % to the current level of 52.0 %. The other Area Municipalities increased their share of non-residential building permits.

Residential building permits in 1988 accounted for 68.1 % of all building permits issued. This is an increase from the 1981 level when residential building permits counted for 41.1 % of all building permits issued. The value of industrial building permits has fluctuated between 1981 and 1988, with 1986 representing the peak year for industrial permits. In 1988, commercial building permits were at their highest level at $78.5 million. Institutional permits peaked in 1986, but in 1988 were more than double the 1981 level.



Source: Statistics Canada, Catalogue No. 61-203.

4.1 Residential Building Permits

Hamilton-Wentworth has experienced significant growth in residential construction permit values increasing by 376.2 % between 1981 and 1988. Overall, each Area Municipality has seen the value of residential building permits increase since 1981. With the exception of Glanbrook, the value of residential building permits peaked between 1986 and 1987.

In 1988, 71.5 % of issued residential permits were for single dwelling units. The remainder, in descending order, are: apartments 15.0 %; row houses, 11.8 %; conversions, 1.3 %; and duplexes, 0.5 %.

Residential Building Permit Values Area Municipalities ($Millions)

	1981	1988	% Change 1981-1988
Ancaster	10.4	45.2	334.6
Dundas	5.0	21.9	338.0
Flamborough	8.6	53.1	517.4
Glanbrook	1.5	5.8	286.7
Hamilton	24.1	139.6	479.0
Stoney Creek	21.9	74.9	242.0
Total	71.5	340.5	376.2

Source: Statistics Canada, 61-203 (1981 to 1986), Area Building Departments (1987-88)

5.0 Manufacturing

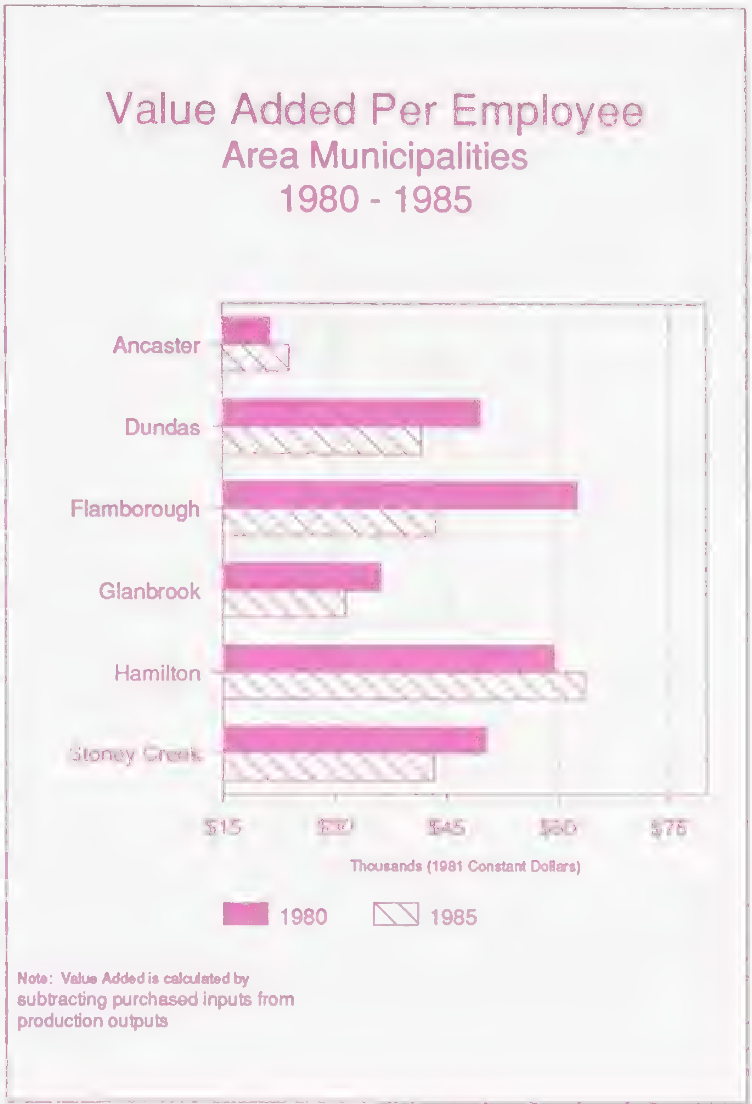
Between 1980 and 1985, total manufacturing value added increased in the Region by nearly 24.0 %. During this same time period, the total number of production and related workers decreased by 16.0 %.

The total number of manufacturing establishments within the Region declined by 4.0 % between 1981 and 1985. Ancaster and Stoney Creek had a net increase of thirteen manufacturing establishments. The number of manufacturing establishments in the remaining Area Municipalities declined. Flamborough experienced the largest single decline, from 24 to 13 manufacturing establishments.

As a result of the decrease in both the number of production workers and the number of firms, total person hours worked in production (per year) within the Region decreased by 13.5 % between 1980 and 1985.

Only Hamilton and Ancaster increased their productivity levels between 1980 and 1985. In 1985, Hamilton accounted for 91.5 % of the total value added within the Region.

Aggregate productivity for the Region increased between 1980 and 1985, from $58,475 to $72,985 per employee (1981 constant dollars), an increase of 24.8 %. By contrast, real productivity in Ontario increased by 8.6 % in the same time period from $55,756 to $60,545. The Region's increase was due to Hamilton's concentration of employment and firms. This increase in productivity is the result of shifting manufacturing techniques as firms are becoming more capital intensive within the Region.



Source: Statistics Canada, Catalogue No. 31-205.

5.1 The Steel Industry

The steel industry has fully recovered since the recession of the early 1980's. There was a strong demand for steel products in 1988 and 1989 is expected to be a good year as preliminary orders for the year remain high. Between 1984 and 1988, total steel shipments were up by 5.1 % for Stelco and 33.9 % for Dofasco. The Canadian market is the largest market for domestically produced steel. Under the Free Trade Agreement, Hamilton steel products are now assured access to the United States market. In 1988, Canadian exports of steel accounted for 3.2 % of U.S. steel consumption, while total Canadian steel exports were four million tonnes. The Canadian steel industry had a one million tonne trade surplus in steel shipments in 1988.

With Dofasco's purchase of Algoma Steel in 1988, Dofasco-Algoma is now Canada's largest steel company, and the fourth largest in North America. In order to increase their international competitiveness, both Stelco and Dofasco have invested heavily in their Hamilton operations. Both steel companies are embarking on major capital improvements to their Hamilton mills. Dofasco will be adding a new cold-rolling mill while Stelco will be proceeding with a fourth steel processing line for the Hilton Works Mill.

6.0 The Health Care Sector

Health care facilities and services in Hamilton-Wentworth play a significant role in the local economy. The market area for the Region's institutional services is comprised of eleven regional municipalities and ranges from Durham to Wellington to Haldimand-Norfolk. In 1988, the total population within this market area was 5.35 million.

Within the Region, the seven hospitals are organized into five units for administrative purposes with each of the seven hospitals having adopted a specialized role. The seven Hamilton area hospitals have a total operating budget of $501.6 million.

The Region has completed Phase I of a feasibility study for the establishment of a health care and medical technology business park. Phase II, which is now underway, is examining locations and the specific characteristics for such a park.

Operating Statistics
Hamilton-Wentworth Hospitals, 1988

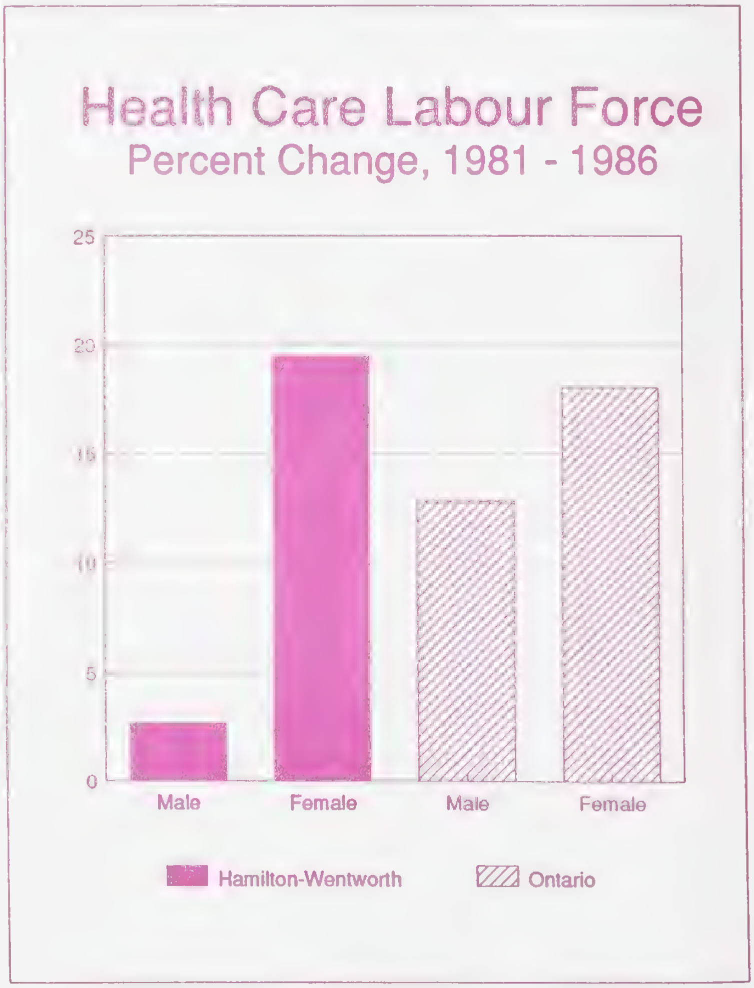
Hospital	Total Staff	Budget ($ Millions)
Chedoke-McMaster	4,495	165.0
Hamilton Civic	3,078	168.0
Hamilton Psychiatric	727	34.5
St. Joseph's	2,787	115.9
St. Peter's	520	18.2
Total	11,607	501.6

Source: Individual Hospitals.

6.1 The Health Care Labour Force

Employment specialization in health care occupations is higher in the Region than in Ontario. Since 1961 the degree of health care employment specialization in the Region relative to Ontario has been increasing.

From 1981 to 1986, the health care labour force expanded by 16.3 % in the Region. This compares to a 16.9 % increase in Ontario. The total number of residents in the Region employed in medicine and health care occupations increased by 16.3 %, from 9,615 in 1981 to 11,180 in 1986. The female labour force accounts for the majority of the total health care labour force, and has grown faster than the male labour force. Female employment in the health care sector accounted for 97.0 % of the total increase in health care employment. Total female employment increased by 19.5 %, while overall male employment increased by 2.7 % between 1981 and 1986.



Source: Statistics Canada, Special Run (1981), 94-114 (1986).

7.0 Regional Trends

7.1 Disposable Income

Real disposable income in Hamilton-Wentworth increased from $4,239 million in 1986 to $4,914 million in 1988, an increase of 15.9 %. This rate of increase was above the national increase of 7.9 % during the same time period.

Real per capita income in the Region increased by 16.3 % from $9,850 in 1986 to $11,460 in 1988. This was above the rise over the same period for Ontario of 14.3 %.

Source: Financial Post, Canadian Urban Markets.

7.2 Housing Starts

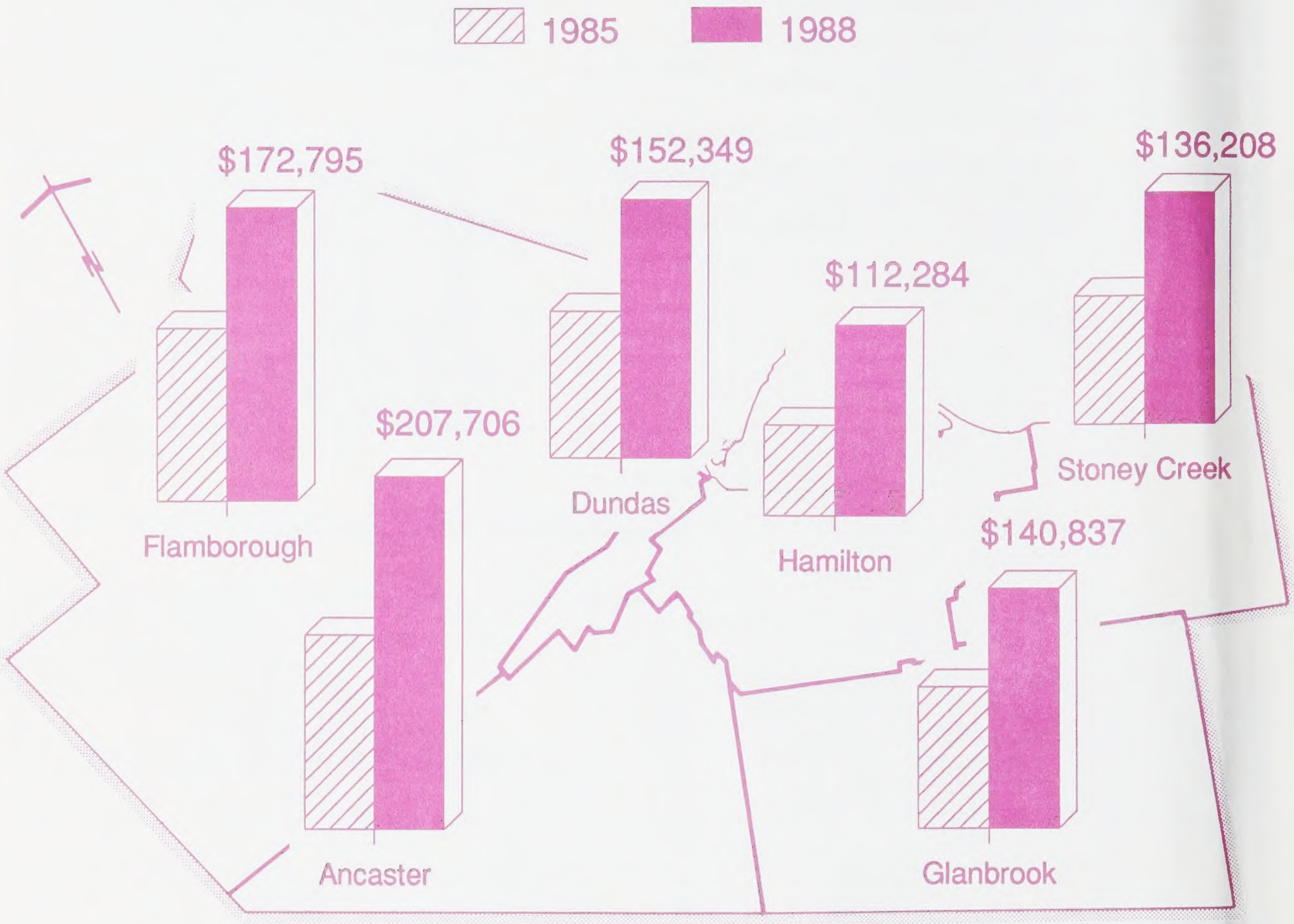
Escalating Metropolitan Toronto housing prices have contributed to increased residential activity in southern Ontario. In Hamilton-Wentworth annual housing starts increased by 22.2 % from 2,153 to 2,631 between 1985 and 1988. In 1987, housing starts reached a record high of 3,255.

Source: Statistics Canada, 64-002.

8.0 Conclusions

Since the 1982-83 recession, the Hamilton-Wentworth economy has completed a full recovery with strong growth in population, employment and income. Economic growth in Hamilton-Wentworth has proceeded at a steady and constant level, rather than short term explosive growth. Major infrastructural improvements (Highway 403 completion and full GO Rail Service) will only serve to assist in the maintenance and continuation of economic growth within the Region into the 1990s. beyond.

Average Residential Property Sales Value
Area Municipalities, 1985 and 1988



Note: The dollar figures indicated are the average 1988 residential selling prices for each area municipality.

This is one in a series of information bulletins produced by the Regional Planning Branch of the Planning and Development Department, Regional Municipality of Hamilton-Wentworth.

Other Bulletins currently available:

- Greater Hamilton Population Trends and Projections (Report 89-1)
- Greater Hamilton Regional Centre (Report 88-2)
- Greater Hamilton Large Office Inventory (Report 88-1)
- Greater Hamilton Industrial Development (Report 87-4)
- Greater Hamilton Construction Trends (Report 87-3)
- Greater Hamilton Labour Force (Report 87-2)
- Greater Hamilton Population Trends (Report 87-1)

For further information, please contact William Lambert at 526-2646.